

Community Directors Intelligence

March 2018

The keys to collaboration

By *Chris Borthwick, Thinker in Residence, Our Community*

Working in the same field as another group – having common ideals, or common goals, or even common interests – is no guarantee that you're going to be close friends. Sometimes it's the other way round. A group of like-minded people pursuing a common goal in a similar fashion is, after all, one way of describing the runners in the Melbourne Cup, but there's a certain amount of healthy rivalry going on there nonetheless. Sooner or later, the time is going to come when you will want to emphasise what separates you rather than what unites you.

As the instructional story goes, two tourists are strolling on the veldt one evening, chatting idly of this and that, until their conversation is interrupted by a noise.

"Excuse me," says the first tourist, "did you, I hope, just say 'Grrrrr'?"

Apparently not, because when they slowly turn they see behind them a large lion pawing at the ground and licking its muzzle hungrily.

The first tourist looks around and sees his companion bending over to tie his shoelaces.

"What are you thinking?" he hisses. "You can't outrun a lion!"

"I don't have to outrun a lion," his companion says calmly. "I just have to outrun you."

Competition between rivals; evolution's way of making faster tourists. And society's way of making more efficient not-for-profits.

At least, that's how the story used to go. >

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Since then, though, we've all seen [that BBC film](#) where three unfazed Dorobo hunters with pointy sticks scare 15 lions away from their fresh kill. The men track the pride down, confidently stride out towards the ravenous bloody-mouthed pack of overmuscled killing machines, shoo them away, and swiftly pillage the carcass for some wildebeest steaks.

The results are in: co-operation produces better outcomes for everybody.

In many situations, partnerships with other organisations in your field are going to be essential to achieving your ends – working together to raise funds, lobby, or deliver balanced programs. You need to engage in active outreach at all times, however busy you may be, and to keep your friendships in good repair.

In unity is strength. Which is why this month we're reminding everybody of the good sense of joining up to the [Community Council for Australia](#), a central voice for not-for-profits in the halls of government. At a time when the government is feeling increasingly cranky about criticism from the sector, and is increasingly looking to legislation to bring it to heel, we're all safer for the existence of a peak body to make the argument for us.

Mega-organisations can take care of themselves, but for small but feisty groups it has to be worth \$110 a year to have a full-time bodyguard. It'll save you a lot of work, too, not having to put in your own individual submissions to the plethora of inquiries the government throws out as a smokescreen for its manoeuvres, and you'll avoid [drawing fire](#).

We've signed on: so should you.



Thinker in Residence Chris Borthwick finds there's strength in unity.

P.S. You must remember that if you're on the board of your group, then in the eyes of the law your fiduciary duty requires you to place the interests of your group first, even in front of those of your partnering organisation. If you happen to be *stuck in a snowbound train*, for example, it's your legal duty – whatever your own feelings on the matter – to [eat the other group's board members before your own](#). It's not, to be sure, a situation that comes up very often, but there's no harm in being prepared.

MORE INFO

[Looking for help? Search the ICDA site for resources](#) 




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Your institute's future as a 'beacon' of good governance

By Matthew Schulz, journalist, Our Community

The new chair of the Community Directors Council, Susan Pascoe, the former chief of the Australian Charities and Not-for-profits Commission (ACNC), tells how she'll lead the new advisory body for your Institute of Community Directors Australia (ICDA).



How do you see the role of the new Community Directors Council?

I think the Community Directors Council is going to fill a bit of a gap in terms of governance training for not-for-profits in Australia, in that although there are a number of existing providers, whether they're higher education providers, community providers, professional organisations ... there's no-one that exists exclusively to train not-for-profits in governance responsibilities. That's going to be a great role for this council.

At the first meeting, there was a great sense of purpose and momentum amongst the members, and we will be developing a strategic plan to guide our work.

How important are not-for-profits and charities to this country?

I think they're critical, particularly to the maintenance of effective communities. The Canadians often say charities exist "to do good

The new Community Directors Council chair with Our Community chair Carol Schwartz at the recent announcement of 94 scholarships for women across Australia. Picture: Matthew Schulz

for others". That's a nice way of phrasing it. Because, it could be in the cultural sphere, it could be in welfare – including overseas aid ... any number of areas. From a legal point of view, in 2010 when the High Court made the decision on the [AidWatch](#) case, emphasised the fact that charities are important for a healthy democracy.

Tecently, Prince William in a speech to the Charity Commission of England and Wales said the royal family don't do charity work because it makes them look good; they do charity work because they believe it's critical to the maintenance of sustainable societies and for the health of civil society in the UK. >

The members of the Community Directors Council



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Catherine Brooks

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Community Directors Council members have been drawn from across community, not-for-profit, philanthropic, academic, activist, indigenous, and legal backgrounds to guide the development of the Institute of Community Directors Australia (ICDA).

Where would we be without community directors?

It's hard to imagine, in that there's such an impulse within people to do good for others. I noted it when I was on the Royal Commission into the Victorian bushfires. If you look at the way that communities responded, there was a spontaneous initiative taken from countless

people to assist others who had had a misfortune during that dramatic event. I also think that there's an impulse toward altruism, and toward nurturing either others or animals, or the environment, or the community, that you couldn't really quell in humans: it's there. And so the work that they do in civil society, generally on a voluntary basis ... is a really healthy outlet for those impulses that many of us have. ➤



Members of the Community Directors Council have met for the first time in Melbourne.

How are community directors different from company directors?

I think there are more similarities than differences between what community directors do and company directors, in that they're both responsible for the effective governance of the enterprise, and for critical matters such as sound financial management, good governance practice, and a focus on the bottom line.

Here's where we get the critical difference. For company directors, the bottom line is profit. For community directors, it's whatever the mission or purpose is. So, if it is to support animal welfare, it's healthy animals in whatever community it is in. If it's in the arts, it might be toward sustainable performing arts, and so on.

We typically think of charity in the traditional sense of welfare, or helping the vulnerable and the disadvantaged. And of course, for mission-driven organisations, that's a critical purpose as well.

I would want to emphasise as the recent and inaugural Commissioner of the Australian Charities and Not-for-profits Commission (ACNC) that overwhelmingly the evidence is that charities want to do the right thing, and indeed do do the right thing. And so there is great ground-level initial capability in most of the boards.

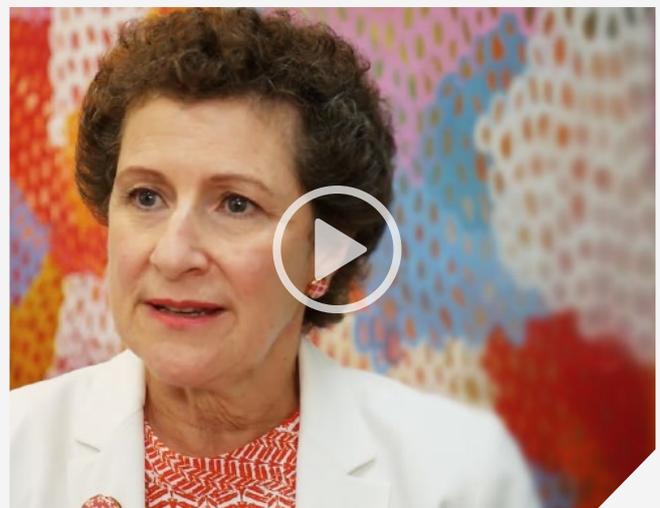
What the new Community Directors Council wants to do is build on that, enhance that.

In the same way as the Australian Institute of

Company Directors is able to promote better governance in corporate Australia, the Institute of Community Directors will be able to promote better governance in the community sector.

How do you feel about the mix that you've got on the Community Directors Council?

It's a brilliant mix of people. When you think about the breadth of backgrounds of the members, from academic through to practitioner backgrounds, people who've run very large enterprises, very large charities, and members involved in rural and smaller charitable and not-for-profit enterprises – I'm quite excited about working with them. ➤



WATCH NOW: Susan Pascoe on the importance of advocacy by not-for-profits, and her new role





ICDA members celebrated the announcement of 94 governance diploma scholarships for women at a striking feminist installation at the Australian Centre for Contemporary Art in March.

ICDA offers three levels of membership: associate member, member and fellow. Why should a community director consider becoming a member or fellow?

I think any means of formally recognising that a person has undertaken training, met a certain standard, and then been formally assessed as meeting that standard is good for the individual, but also good for the board that wants to take them on.

Because you can then appoint that person with confidence that they have the basics in terms of good governance.

And in a more collective sense, it's good for the governance of not-for-profits in Australia.

We are building on people who have formally fit-for-purpose recognised training. That means governance in the not-for-profit sector in Australia is in good hands.

How do you see the trajectory of ICDA under the guidance of the new council?

Given the eminent nature of the members, I'm really hoping that they will be able to use their knowledge and their skills and their creative ideas to collectively enhance good governance training



WATCH NOW: Susan Pascoe in conversation with Our Community chair Carol Schwartz at launch of 94 women's Diploma of Business (Governance) scholarships

in the not-for-profit sector in Australia. And it would be great if over time ICDA becomes a beacon, a badge of recognition of good training, and good capacity, and good governance in Australia.

MORE INFO

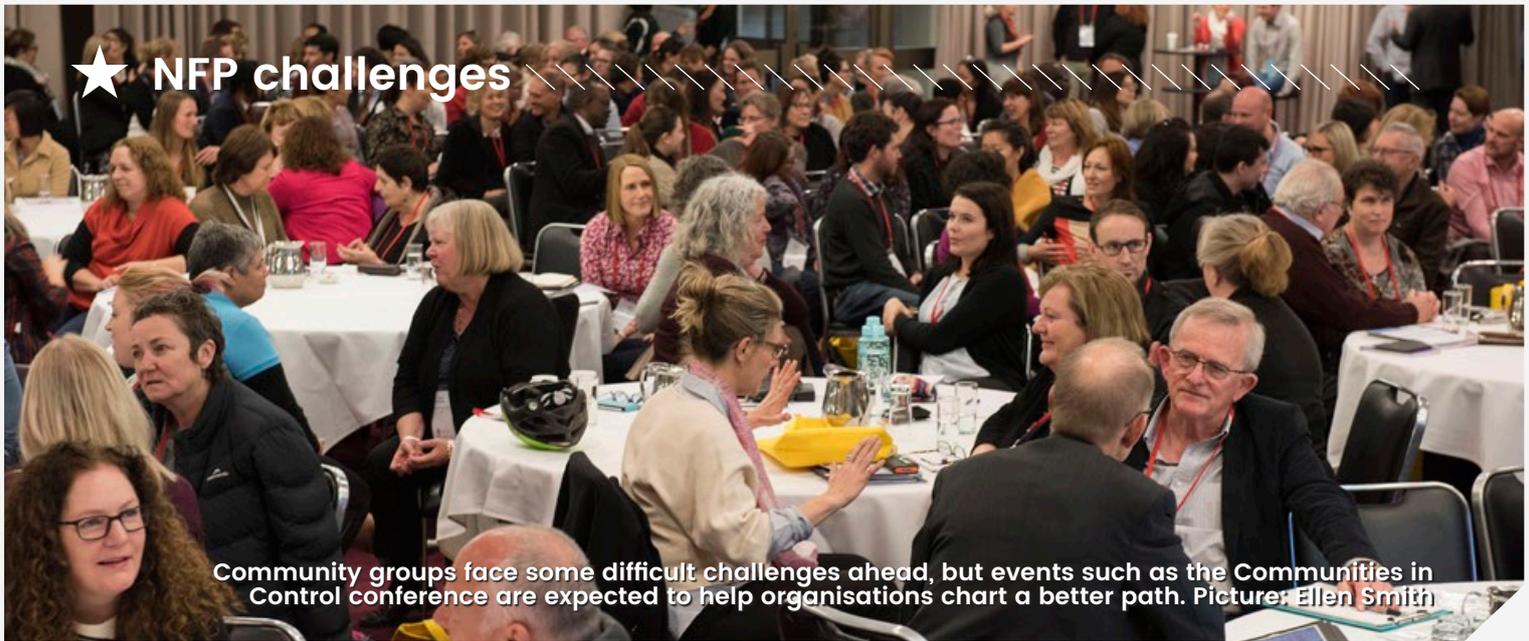
[About us: The Institute of Community Directors Australia](#) 

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Community groups face some difficult challenges ahead, but events such as the Communities in Control conference are expected to help organisations chart a better path. Picture: Ellen Smith

The big issues facing not-for-profits

By Matthew Schulz, journalist, *Our Community*

We've asked several influential figures to discuss some of the big issues for not-for-profits. We'll keep asking this question of significant players who can inform ICDA members.

Among them this month are Community Directors Council chair Susan Pascoe, the not-for-profit team at law firm Moores, Wellways chief Elizabeth Crowther, and Jocelyn Bignold, CEO of McAuley Community Services for Women and a Diploma of Business (Governance) graduate.

Income the key for many groups

Susan Pascoe, who until late last year headed up the Australian Charities and Not-for-profits Commission, was quick to point to three things: income, advocacy, and maintaining your mission.

She said generating enough income would continue to be a big issue for organisations.

"It's always a perennial issue for not-for-profits: their income stream, and there's a great variety of means by which not-for-profits do remain financially viable. For some it's donations, for others it's grants and contracts."

"Many not-for-profits – just over half – generate quite a bit of their own income through ventures like opportunity shops or fee-for-service for some of the services they offer; investments if they've got monies in reserve.

"They're generating income to help themselves become sustainable and that's a very strong thing, so funding would be number one, because every time you meet with charities, it comes to the fore."

Advocacy high on the agenda

Advocacy would remain at the centre of debates around the board table too, she said.

"I think the issue of advocacy and the right of charities to advocate is one that's in public debate at the moment, because of proposed changes to the Electoral Act.

"They're intended to limit the influence of overseas countries in Australian elections and political affairs, but inadvertently might be capturing charities and others in their slipstream.

"The right of charities to advocate – which is really for them at the heart of their enterprise – needs to be protected." ➤

Stay on target

Ms Pascoe said staying focused on the main goal would remain a critical issue for organisations for the foreseeable future.

"For many charities, it's maintaining mission and staying on a sustainable footing, which is not dissimilar to the funding issue ... and ensuring that you keep the trust."

McAuley Community Services for Women chief Jocelyn Bignold, a community sector stalwart for 25 years, has seen many changes in her time, but agreed that some of the biggest issues would be those that have been preying on the minds of not-for-profit leaders for years.

"There are some perennial challenges which get more or less attention at different times, but don't seem to go away," Ms Bignold said.

These include the lack of time not-for-profits are given "to prove what works over time, as attention shifts to the next issue. We risk nothing getting fully resourced and resolved."

Her fix? To "hold steady on some policy issues".

"The introduction of 10-year plans is good, but I don't think we're resourcing them over that time period or reporting back on results."

Along similar lines, Ms Bignold said organisations needed to avoid being driven by "market forces".

"Don't let the 'market' decide what's best. It can't," she said.

Her approach? To accept "some things just should be funded by the public purse".

She cited a recent Productivity Commission report that identified sectors where the "market" is ineffective, such as affordable housing.

"Governments need to listen to people who have the expertise to inform resource allocation decisions," Ms Bignold said.

Support systems lacking

Ms Bignold also nominated the lack of infrastructure needed to support the NGO sector.

Her solution? "To spend on decent, interconnected databases and IT. That's something that government or business can do at scale with great efficiency and impact – if only they put aside political expediencies."

The alternative, she said, was to undertake research that can really inform sector development.



McAuley Community Services for Women chief
Jocelyn Bignold

"The recent commissioning of evaluations through the family violence recommendations is an example of how that can work."

Similarly, Ms Bignold nominated inadequate "human capital" as an issue.

She referred to the problem of "not enough capacity to properly consider cross-sector collaborations where it makes sense to do so".

Her fix? Funding to develop capacity and investigate good governance models.

In depth: Read more about Ms Bignold's mission on page 34.

NDIS reforms a big challenge

Wellways chief executive Elizabeth Crowther led her mental health and disability support organisation through a recent period of rapid expansion. She said the NDIS rollout would continue to present a significant challenge for many service organisations.

Financial pressures will loom large for Australians with a disability, she predicts, in a trend repeated across the world.

"Our challenge is to continually ask how people with disabilities are going to be treated. How, in a deregulated environment, people will stay safe, and the offers [of help] are real," she says.

"Our fiscal circumstances are really going to push where we're at."

Ms Crowther echoes the views of Ms Pascoe when she says organisations need to advocate >

to ensure they can offer effective services.

“(Not-for-profits) need to be able to pick what the issues are, and try to make a dent in those.”

She said that included being able to point to the evidence of the need, and of your achievements.

“We know there’s 100,000 people who have no home on a nightly basis. We know there are far too many people who have mental illnesses in jail. We know that family disadvantage leads to other sorts of disadvantage. It’s working socially to try to change the circumstances that lead to poorer outcomes for people.”

Profile: Elizabeth Crowther tells how Wellways has charted its course for change, through collaboration, on page 17.



Wellways CEO Elizabeth Crowther says not-for-profits must pick their battles.



Moores representatives: Skye Rose, Tony Rutherford and Rebecca Lambert-Smith.

Regulation shift a big issue

Not-for-profit legal experts Moores recently hosted a briefing about some of the key challenges facing organisations in the sector.

Principals Skye Rose and Tony Rutherford, alongside senior lawyer Rebecca Lambert-Smith, addressed some of those issues in detail.

A large part of the presentation related to the changing focus of the ACNC under new chief Gary Johns, a change that seems likely to result in a tougher regulatory stance, a greater use of data, and a push for greater accountability to donors and increased efficiencies.

Ms Lambert-Smith said it was more important than ever for registered charities to be aware of their obligations under the ACNC’s governance standards, and particularly the commission’s current focus on compliance as it relates to:

- preventing terrorists from using charities as a front
- avoiding harm to beneficiaries such as children and vulnerable adults
- cracking down on fraud and financial mismanagement
- political activities. >



Organisations should also watch for outcomes of the [ACNC Act review](#) (particularly any changes to the ACNC's objects), the recent [Royal Commission into Institutional Responses to Child Sexual Abuse](#) and proposed changes in relation to [political expenditure reporting](#) and 'political campaigners'.

[Click here to read Mr Johns' most recent statement](#) about the direction of the commission.

Brace for an unstable workforce

Moore's principal Skye Rose addressed key challenges for not-for-profits in the workplace, particularly in the disability sector.

While not-for-profits now employ a whopping 10.6% of the Australian workforce – split almost equally between full-timers, part-timers and casuals – the rate of turnover is increasing, and so attracting and keeping staff will remain a big challenge.

She says organisations have to think about more than remuneration when it comes to staffing.

"There is significant pressure on service providers to be competitive, flexible and responsive," particularly in regards to the growing and changing NDIS workforce, Ms Rose said.

This pressure could see some providers "sharing" employees, with the risk some workers could breach maximum work hours, and it brings workplace health and safety and workplace injury issues to the fore.

Organisations should be careful not to misclassify workers as independent contractors or volunteers, and to ensure they're using the correct industry awards, or face fines of up to \$54,000 per contravention.

Mergers or collaborations? More questions for organisations

Tony Rutherford – an expert in mergers and acquisitions at Moores, and previously in the corporate sector – said the NDIS transition is forcing organisations to consider how they're structured.

"The state of upheaval is quite significant, so anything you can do to become more efficient will be significant," Mr Rutherford said.

He said the NDIS is forcing competition between providers to such an extent that it is almost shifting the culture from not-for-profit to a "for profit" model, and making organisations ask themselves, "Are we the best in show?" at a time when funding for services is capped, regulation is increasing and consumer demands are rising.

But while mergers or acquisitions are "at the apex of what you can do with two or more organisations", there are several other options that not-for-profits can consider.

"There are options to dip your toe in ... there's no reason that this can't be done in a small way, as a starting point," Mr Rutherford says.

Read our special report on legal models for collaboration (Page 21)

MORE INFO

[Advocacy a hot topic: From the latest edition of Our Community Matters](#)

[In-depth guide: Thinking Big: To Merge or Not to Merge – That Is the Question](#) 



The Geelong Project's stunning results a joint effort

How a small city slashed homelessness, boosted school results and became a model for the world

By Matthew Schulz, journalist, *Our Community*

There are those who think collaboration is just another buzz word, but not in Geelong.

In Victoria's second-largest city, a joint effort by schools, a not-for-profit, a university, a youth agency, and an employment network has slashed youth homelessness, while boosting school retention rates.

Youth homelessness has plummeted by 40 per cent in just three years thanks to The Geelong Project, as it's been dubbed. The number of early school leavers at the three pilot schools dropped 20 per cent, and disengagement levels by those most at-risk kids dropped by 50 per cent.

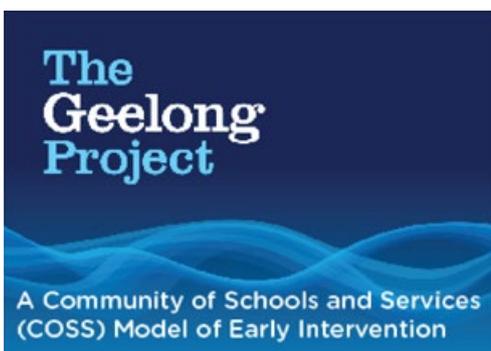
Regional cities across Australia are now looking to replicate the Community of Schools and Services (COSS) model of early intervention.

The project has been led by the independent, not-for-profit community service organisation Barwon Child, Youth & Family (BCYF), with the close involvement of Swinburne University; Headspace Geelong; the Geelong Region Local



The Geelong Project helped Northern Bay College student Josh deal with family conflict and financial pressure to keep him at school.

Learning and Employment Network (LLEN); and three pilot schools – Northern Bay Secondary College, Newcomb Secondary School and Geelong High School. >



Partners in The Geelong Project collaboration.

The results they've been able to achieve are astonishing, and it was no surprise to see the project splashed across news services at the release of a detailed interim report demonstrating the work they've already accomplished.

Swinburne University Associate Professor David MacKenzie, who authored the 62-page interim report, described the project as "fanatically focused on outcomes".

The power of a community coalition

Drawing on past studies connecting family and home life with school performance, the trio of schools and agencies – guided by an executive governance team – used an early intervention model to create a "community of action, a coalition".

Professor MacKenzie says the group was united by a sense of community, location and vision, and all focused on one question: "What can we actually achieve for these young people?"

"That's been quite difficult, because we were not just one little program working with 50 kids. We're taking a whole of Geelong approach, and we're working intensively in the three most disadvantaged schools.

"The logic of the model is twofold.

"One is to reduce homelessness (because of) family breakdown leading to kids leaving home too early. The other contention is that behind the educational disadvantage, a major part of it comes from the family you're born into it."

He says factors at play could include whether your parents finished high school, what's going on in the family, domestic violence, and the fact that you're poor, all of which can "shape your aspirations".

"We do something about that in the Geelong model."

"We want kids to stay on at school, or if they leave school, we want them to stay in education and get the equivalent of Year 12."

He says the results are nothing short of "extraordinary", but "it's proved with official statistics, not contrived in any sort of soft measure".

Homelessness, disadvantage needs a joint approach

He says the work of The Geelong Project is rightly a model worth pursuing, if only to tackle the twin



Professor David MacKenzie says The Geelong Project has attracted worldwide attention.

issues of youth disadvantage and homelessness.

"One in four young people do not finish Year 12. Some of them recover their education but about 15 percent never do and may face lifelong disadvantage."

To put these percentages in context, 41,000 young people experience homelessness and go to homelessness services in Australia each year.

"We really need to face the challenge of what do we do to help our young people these days. What do we need to do? What do communities need to do?"

He says what's made the COSS model effective is "deep collaboration to change the local service system".

"So, identifying problems early, responding in a different way, having a very strong commitment to outcomes – that's very different from the existing service system. And if we're honest, many of our existing programs are nowhere near working well enough."

"There's a saying that it takes a village to raise a child. And it takes a whole community effort to end youth homelessness and to make a difference around early school leaving. What I think the model has achieved is ... I believe an absolute first in this country or anywhere else."

Getting the ear of government, funders

Several jurisdictions in Australia and overseas are showing interest in the collaboration model, with the Victorian Government's Treasury already >



Northern Bay College student Josh (with iPad) and another project participant talk to social worker Michael

considering an expansion of the project into other regions.

There's also serious interest from Canada and the United States, with representatives of the project expected to meet with authorities and foundations there soon.

Part of the appeal is the desire by authorities to reduce the cost of homelessness, with a separate study showing that the 41,000 homeless young people cost the health and justice system \$629 million annually – and that's not including the \$621 million spent on providing homeless services.

“Not only should we make a difference in the lives of families and young people that need our support and our help, but we're actually doing some good in terms of the community's finances as well. Early intervention saves money. I think what the Geelong Project has shown is that you can make a real difference if you're prepared to reform the local service system.”

Professor MacKenzie is enthusiastic about the potential for the collaborative approach to be adopted elsewhere. And while he accepts that regional cities have some advantages in terms of having a distinct sense of community that drives cooperation, he believes there is nothing about the model that is unique to Geelong.

“All of its component parts, if you're prepared to take on the challenge of reform, can be reproduced and we are now doing that. So hopefully, in the future, it could become a systemic change that would make an enormous difference.”

Collective decision-making and strong leadership crucial

Some of the key components of the COSS model have been a commitment to community

development, strong leadership and vision, a clear governance model that enables shared decision-making, a “whole of population” screening process, and accepting that significant changes to processes, work practices and more can take time.

“I believe that people only come together if they have got some sort of niggling critique that things are not as good as they should be. I think in just about every community I've ever gone to speak to or been involved in, there are such people.”

He says that the group must be “prepared to create a coalition of people with a stake in the problem and work through that process with a facilitatory form of leadership”.

Also essential is ensuring that collaborators “make decisions together”. In the case of The Geelong Project, that role fell to an “executive governance group”, which made all the key policy decisions.

Cutting back on competition

Geelong, as a small regional city, has seen “friction” between organisations competing for limited funds in the past, but Associate Professor MacKenzie says competition has been reduced by the collaborative forces at play.

“Now that we've got a ... community collective, that problem is less of a problem, because the collective says, ‘We're going to go for this funding. Which is the appropriate organisation or subgroup to actually go for that particular funding?’

“A lot of that competitiveness has been deflated by the fact that we're much more a collective, acting for the whole of the community, but in different ways.”

He says organisations usually “co-operate at least as much as they compete”, but says this is ➤

particularly true in regional communities, which often have “a lot greater reason to work together”.

He has witnessed a trend here, saying, “The more collaborative you become, the stronger the collective becomes, and the less that competition ... seems to occur.”

Partners aligned for greater impact

The CEO of the lead agency, Barwon Child, Youth & Family, says the joint project has reinforced the agency’s vision of “a community where people are safe, connected and empowered to live well.”

CEO Sandy Morrison said the design principles underpinning The Geelong Project were aligned to BCYF’s vision, yet could also be adapted to other social problems and local communities.

One of the strengths of the program was that it “borrows from existing evidence-based practice”, with key features being early intervention and a thorough understanding of the problems to be addressed.

“Fundamental to this is the use of a collective impact methodology with a focus on co-design, client input and strong cross-sector partnerships,” Mr Morrison says.

“We know that we have a much better chance of reducing adverse outcomes for our clients when we intervene early. The Geelong Project is a shining example of a local community project supported by strong leaders with a collective vision to build integrated, timely and flexible responses, so that young people have the best opportunity for good life outcomes.”



WATCH: David MacKenzie reveals key findings from The Geelong Project.

Top lessons from The Geelong Project for would-be collaborators

Significant factors that have led to The Geelong Project’s success include good governance and decision-making models; a shared vision and goals; and strong leadership that facilitates co-operation rather than a top-down “transactional” style in which a dominant player directs all the activity, Professor MacKenzie says.

His report also spells out a series of key considerations and lessons for would-be collaborators, albeit focused on its COSS model. They include these:

Considerations

- Shared information
- Making joint decisions
- Regularly consulting and conferring
- Participating in cross-sectoral bodies for joint work
- Starting small, then growing a program
- Understanding the need for future development (of the program)
- The need to push for simpler funding models that support this style of collaborative work

Lessons

- Changing practices will be a crucial challenge
- Understanding a common vision shared by all participating stakeholders takes time
- Getting a common data system to work requires training and experience
- Building a community of service requires a realistic catchment
- Try to use local areas services that are already well established
- Build community partnerships and a community consortium, not just a distinct single program or set of programs that changes little else systemically
- Training and development programs are critical, and may involve online training, professional training across sectors, a community of practice, and conferences to cement a sense of “collective impact”.

MORE INFO

Media reports: [ABC news](#) | [The Age](#)

[Report summary](#) | [YouTube clip](#) | [Download: The Geelong Project Interim Report in full \(PDF\)](#) >



Geelong project case studies

Mediation, counselling smooths issues for Bernadette

Everyone knew Bernadette, 14, was at risk of homelessness and dropping out.

The Australian Index of Adolescent Development (AIAD) indicators rated her 8/10 for the risk of homelessness, and 17/25 for disengagement.

At home there'd been battles with her mum, Sally, about house rules and chores, as she battled to cope with the recent death of her father.

At school she was disruptive: fighting with peers and refusing to follow teachers' instructions.

But worst was the fact she'd begun to commit self harm amid mental health concerns.

The Geelong Project's response included help for her mum, with family mediation creating a big improvement at home.

Headspace helped Bernadette with counselling for both grief and the self-harming behaviour, which in turn saw a significant impact on the disruptive behaviour at school.

Crisis care kept Belinda in class

Belinda, 15, came to the attention of the school's wellbeing officer just before the school holidays because of major family conflicts and suspected domestic violence.

A project worker met Belinda's mum, Julie, who revealed "significant safety issues with her partner including monitoring the time that mother and daughter spent in the shower; monitoring electricity use; not allowing phones to

be charged; both mother and daughter feeling that they had to leave the house during the day because they are too scared to touch anything."

The worker learnt Belinda had been a victim of violence, but her mother's own stress and having suffered abuse meant her ability to help was limited.

Child protection authorities were notified, but The Geelong Project's own workers provided the support, organising for Belinda and Julie to move into crisis accommodation with the help of the Barwon Centre Against Sexual Assault (CASA) and the Salvation Army, and a safety plan was enacted for both mother and daughter.

Belinda stayed at school.

Project's intervention helps tame troubles for Bree

Bree, 18, an Indigenous woman, had just enrolled at a Geelong school when her case came to the school's attention.

Having suffered sexual abuse at the hands of another family member, she faced a difficult and chaotic situation. She had struggled with her existing supported accommodation and had no income.

The Geelong Project's team were able to set up Centrelink payments, help with a budget to secure her accommodation, and provide counselling and mediation to assist her in controlling "outbursts" and poor stress reactions, as well as to deal with bullying and alcohol. CASA helped with sexual abuse counselling and helped her to tackle her high-risk sexual behaviour.

Bree is still in school, where she is involved in a vocational stream, and attends weekly meetings to keep her on track to greater independence. 



Bill and Tracy, with two of their children, say their experience with Wellways has been life changing.

Focus, opportunity the key to collaboration that works

Australian NDIS provider's rapid growth a lesson in change and partnerships

By Matthew Schulz, journalist, *Our Community*

Wellways is now one of the country's top mental health and disability support organisations, a not-for-profit with services spanning five states and territories, and is now well placed to take advantage of the National Disability Insurance Scheme.

It has positioned itself via a series of acquisitions and collaborations, and its experience contains plenty of lessons for community directors.

The organisation has more than tripled its revenue in three years, from \$32 million to \$80 million, as it has expanded its footprint from Victoria to the north-east and east coasts of Australia. It now provides services in Queensland, New South Wales, the Australian Capital Territory,

Victoria and Tasmania, partly as a result of acquiring another business, Australian HealthCall, in 2016.

Its services span mental health, disability, rehabilitation and community care, and its workforce of more than 1200 comprises nurses, clinical staff, community support workers and peer workers who've lived with mental illness.

Wellways also boasts more than 100 partnerships with government, health and community organisations. It's a long way since it formed as the Schizophrenia Fellowship of Victoria four decades ago.

When *Community Directors Intelligence* spoke with Wellways chief executive Elizabeth Crowther about the organisation's path, two key themes came up repeatedly: "focus" and "opportunity".

Time and again, Ms Crowther returned to those touchstones as the keys to unlocking the benefits of collaboration and amalgamations.

The board has been critical to the organisation's success, guiding Wellways through tumultuous change, while always keeping a close eye on the organisation's original mission. >

That remains: "We connect people, strengthen families and transform communities for individuals of all ages experiencing disabilities or challenges to their social and emotional wellbeing".

Ms Crowther told *Community Directors Intelligence* how the organisation has managed to thrive in a tough environment, and described how it continues to deliver on its promise.

Can you summarise some of the upheavals Wellways has undergone?

Three years ago, we were facing the changes all our sector was facing. We were looking to predict what was going to happen in the new world, after the Gillard government's decision about Medicare Locals and the introduction of the NDIS, and the impact that it would have on our "business as usual". We had the board engaged in that process, and we recognised that if we were going to be in this new NDIS world, we had to grow.

What is different about Wellways now compared to a few years back?

Traditionally we've been a mental health support agency. Through this process, and being part of the NDIS rollout, we recognised that you can't cut a person up into "diagnostic groups" and we needed to look after and offer services to the whole of the person.

As a consequence, we began working with people with disabilities and we found we were good at it. We decided that we would invest more actively in disability, and so we purchased a disability agency. So, from a turnover of \$32 million three years ago, this year we've got turnover of nearly \$80 million.

So that has been a success, but obviously it hasn't been easy.

We've been very lucky that our board has been with us all the way, prompting and prodding and guiding. And what we needed to do was to segment our business: identify which parts of the market we were going to work in and develop structures to support that. The supports that you need for a \$32 million business are very different to those that made for an \$80 million business.

Our task was to really look and see: how are we positioned for the future? What was our staff profile going to be for each of those market segments? What were our supportive infrastructure IT and other sorts of things going to be? And where do we want to be? And how, in that process, were we going to be true to mission and our vision?



Wellways chief executive Elizabeth Crowther.
Picture: Matthew Schulz

What involvement did the board have?

A very guiding role. Our board are people who have business capacity and have operated in businesses that have grown in their own sectors – not all health. But they know the underpinning business principles that we needed to achieve.

They kept on saying, "Be clear: What's our vision? How are we going to meet it? If you're doing this, is this going to further our mission or take us away from our mission?"

At \$32 million, the board is (still) a bit hands-on. At \$80 million, they really needed to make their decisions around governance very clear, and ask financial questions, product questions, "pipeline" questions.

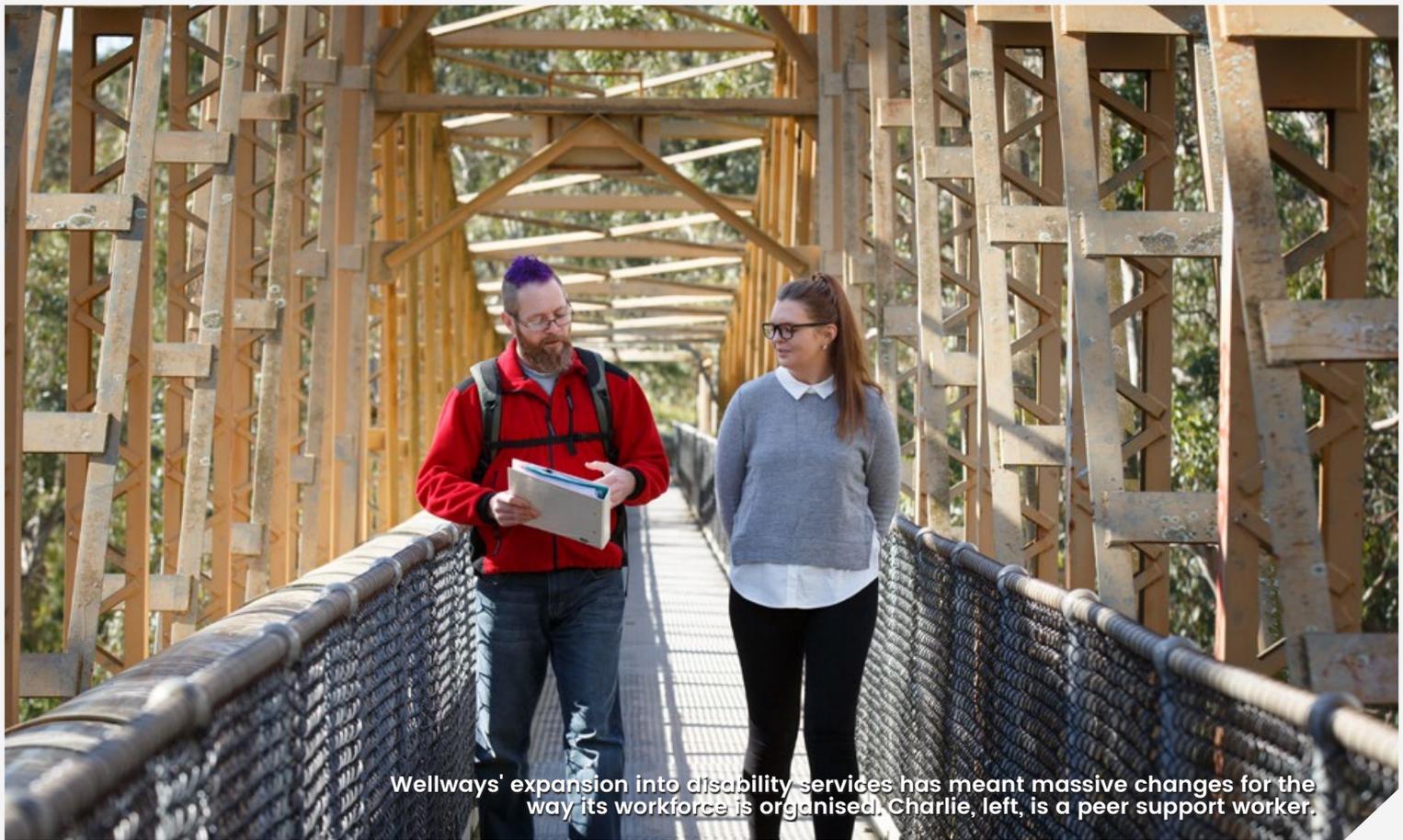
Describe the barriers that you faced.

Money was an issue. The systems we had for the \$32 million business weren't adequate for growth.

We really needed to do a lot of work on our infrastructure and we've had to invest. And that's been challenging. We haven't gone to the bank to seek loans but used our own resources. But of course, that has then posed the other challenge of: How far are you going to use resources and reserves to do this work?

Environmental factors were another issue. When we decided that we were going to [shift] to disability, there was a lot of anxiety. Were we going to lose our mission?

Were we somehow creeping outside of where we should, and traditionally would, be? Our staff were worried about it. Did they have the competency to do this? ➤



Wellways' expansion into disability services has meant massive changes for the way its workforce is organised. Charlie, left, is a peer support worker.

We had a largely degree-qualified staff, so we needed to segment the employment contracts. To operate in the NDIS, we had to casualise part of our workforce, and that was exceptionally painful. And how do you maintain your quality of service within that environment? So we've got three different workforces as a consequence.

How did you manage the process?

To be quite honest, we just went for it. One of the keys was to have a very good tender writer to guide us, that knew the prudential issues that people who let tenders would be after. And he "beat us into shape". He really forced us to look at what were the purchasers wanting. How were we going to demonstrate it? And our performance at tenders became immensely more successful.

We also had a strategy for amalgamations, or purchase, and we then bought that disability agency which brought our turnover partially where it is today. We've also looked at smaller amalgamations to increase our footprint.

What might you do differently, having been through this process?

Not be so scared, have faith in ourselves, not have as many sleepless nights, stick to the plan, bring the board along with us more effectively, and support staff [better].

It would have been useful for us to have thought through our supervision structures in the change environment prior to going into this.

That's all great in hindsight, but in fact you don't learn a lot of that stuff until you do it.

One of the things we didn't have that I wish we had thought through more effectively was our integration, once we had both purchased and/or had an amalgamation.

To have a clearer plan would have been much more helpful.

For the CEOs and board members reading this, what are some tips you can provide?

Be focused. But be prepared to change as the conditions change. Take some time out. Be clear about what you want to achieve and why you're trying to achieve it, and stay on your vision.

It may well be that you're not the organisation – if you're into an amalgamation strategy – that's going to control the deal. In fact, you might have to give up control and to go in with someone else.

Board guidance is really important, as is trust, because this is a pretty scary journey. Amalgamations are difficult.

But they're helpful for your business growth, because you learn so much out of it. ➤





Tash has a mild intellectual disability, but lives independently with the assistance of Wellways worker Corey, who helps her manage some everyday activities, such as cooking and shopping. Ms Crowther says its clients must be the focus.

You've done mergers and collaborations. Which one do you pick, and how?

Opportunity, really. What drives us is that we want to have a "customer intimate organisation". Sure that's jargon, but what I mean is that at the end of the day, the person that you're going to offer the service to is the leader.

Anybody you do business with has to value that interaction. It's coming to any table with something that will advantage the community, and the people that you want to work with.

It also has to benefit the collaborators, because if there's nothing in it for them, why are they going to work with you? They must feel that this isn't a takeover. They must feel that they're getting something out of it, and that you truly believe this. That you've got something that will advantage them.

We don't want to take over the world.

What we want is for the people we offer services to, to get something that works for them. Some things are better done separately from us. For example, we shouldn't be providing housing. We should be working with somebody else who has the housing specialty.

We don't set ourselves up to be financial brokers for people. That's not our specialty. Be clear about what our specialty is, and what somebody else's specialty is, and put the two together.

How can you help an organisation adapt?

Just focus. The reason we exist is that people have needs that they want to be able to deal with. Everybody has a challenge in life, and if you just deliver something that's off-the-shelf, it's not helpful. What gives us joy is the person

themselves getting joy and being able to deal with their circumstances better.

Do you love change, or do you fear it?

My mother told me when I was a child, "Stop moving it around Elizabeth! Things can stay the same." It's been my life: trying to make things better. Creating better opportunities for people, trying to deal with the stigma that absolutely reigns supreme in our community about disadvantage.

Not change for its own sake, but people are often in pretty awful circumstances, and so little things make a difference in somebody's life.



WATCH: Elizabeth Crowther on how Wellways has handled change

MORE INFO

[About Wellways](#) | [Annual review 2016-2017](#) 



Collaboration a merger alternative: NFP lawyers

By Matthew Schulz, journalist, Our Community

Not-for-profit-law experts Moores say collaboration could be the answer for organisations reluctant to merge but still keen to reap the benefits of partnerships.

At Moores' recent Not-for-Profit Sector Briefing, Moores principal Tony Rutherford explained that while mergers or acquisitions are "at the apex of what you can do with two or more organisations", there are other options that not-for-profits can consider.

"There are options to dip your toe in ... there's no reason that this can't be done in a small way, as a starting point," Mr Rutherford says.

"There are a range of contractual measures that allow organisations to collaborate without formally merging to get the benefit of combining the resources and knowledge of two or more organisations." He also discussed non-contractual collaborations.

Moores' latest examination of the options for organisations looking at ways to work together comes on the back of a previously published guide to mergers – [Thinking Big: To Merge or Not to Merge](#) – That Is the Question – co-produced by Our Community, Moores and Commonwealth Bank Not-for-profit Sector Banking.

Mr Rutherford said collaborative models included:

- Joint ventures
- Partnerships
- Co-locations
- Co-operatives
- Communities of practice
- Secondments

Here's a little more information about several of those options.

Joint venture: Established by two or more organisations usually for a specific project. Under an unincorporated joint equity structure, the organisations remain as separate entities and the relationship (including management, liability and funding) is governed by a joint venture agreement. Each party has defined interests and is usually liable for its own debts, which it incurs individually.

A joint venture can also be set up as an incorporated entity. This could involve organisations injecting a small amount of equity into a new, jointly owned corporate entity. Being a company, the entity can enter into contracts or hold property, but it is also subject to the Corporations Act.

Partnership: Similar to a joint venture, except the parties have joint interests in the projects, and are jointly and separately liable for the expenses of the project.

Co-location: Two or more organisations agree to share common premises, resources (such as IT equipment and telephone services) and facilities. Co-location can facilitate the sharing of knowledge and referrals.

Co-operative: A legally recognised entity where members have equal status and voting rights (i.e. one member, one vote). Shareholders, managers and employees generally have no responsibility for debts unless caused recklessly, negligently or fraudulently.

Start-up: As an alternative to the options above, your organisation might consider investing in a start-up, bringing across your organisation's skill, expertise and contacts.

Why should we collaborate?

Mr Rutherford says working with other organisations, through either informal networks or >

more formal partnerships, can provide:

- Greater efficiency and less duplicated effort. For example, a consortia approach to a competitive funding round can deliver integrated service models, and achieve broader geographic coverage or reduced costs
- Access to additional resources or lower costs through sharing resources such as office space, administration or other aspects of an organisation's operation
- Improved service coordination across agencies, with better pathways or referral systems for service users
- A holistic approach to meeting client needs, with better and more efficient access to the range of services required, improved quality and consistency of service and greater responsiveness to needs
- Organisational knowledge and improved service system capability
- Greater innovation and flexibility to respond to changing, emerging or more complex client needs and changing operations and operational environments
- Access to up-to-date information, new ideas and strategic thinking
- Increased capacity to successfully submit tenders or expressions of interest and to deliver projects
- additional expertise, support or legal protection for small, new, or struggling organisations.

Mr Rutherford says often it makes sense to trial a

Benefits of collaboration

- ★ Greater efficiency
- ★ Greater resources and lower costs
- ★ Improved service coordination across agencies
- ★ Holistic approach to client needs
- ★ Greater innovation and flexibility
- ★ Access to new information and strategic thinking
- ★ Additional expertise



WATCH NOW: Tony Rutherford outlines options for organisations that want to collaborate.

collaboration, with or without a merger.

“Sometimes it's to get to know each other a little bit. It's a courtship of sorts, and to get a better understanding of how they can work together and understand their values.

“For any kind of collaboration to work, the values really need to be aligned. It also allows the organisations the flexibility to continue to operate as independent entities but continue to get some of the benefits that a merger might provide.”

He says bringing together “different synergies” can benefit both partnerships.

“One organisation might do something really well, and that might tie in really well with what the other organisation does.”

Collaboration, too, “doesn't require the same level of due diligence that would be required for a full merger”.

How collaboration can mean more impact, more funds, lower costs

Delving into examples of organisations that have worked together to increase their impact, Mr Rutherford cited the Southern Grampians & Glenelg Primary Care Partnership, which shared knowledge between partner organisations to more broadly examine and tackle social issues in south-west Victoria.

Similarly, Big Brothers Big Sisters of America joined forces with Boys and Girls Clubs of America to link mentoring and development programs across the two organisations.

“That cross-pollination that you get from having people with different skill sets and different experiences, allowing you to do things in a >

different way, can be really beneficial to those organisations. “

Collaboration can also boost joint fundraising efforts, or access to funding, such as when eight of Australia’s state-based spinal cord injury organisations created the Australian Spinal Injury Alliance. While each group remains independent, they can represent people with spinal cord injuries nationally.

“Sometimes, the government will prefer to work with combined organisations, whether that’s a formal merged organisation, or whether it’s on a joint venture or consortium basis,” Mr Rutherford says.

Not-for-profits can also reduce their capital expenses and ongoing costs by sharing back office functions such as IT, finance and payroll, or by sharing office space, including heating, lighting and fixed office equipment.

Small organisations can benefit too

Mr Rutherford says “start-up” not-for-profits can make collaborations work for them. He cites the example of Maddie Riewoldt’s Vision, established by St Kilda AFL star Nick Riewoldt to raise funds for the rare blood cancer that killed his sister.

Maddie Riewoldt’s Vision is “powered” by the Snowdome Foundation, a DGR-status charity that aims to “unlock new treatments”. He says



The charity formed to remember Maddie Riewoldt, sister of AFL star Nick Riewoldt, has forged a collaboration with a foundation.

there are clear benefits for smaller organisations able to benefit from the established corporate governance, back office costs, structures and resources of larger organisations.

“There are ways you can make it work early on, even when an organisation is starting from scratch.”

No escaping the risks

Mr Rutherford says one of the biggest risks in collaborating is “getting the cultural fit wrong”.

“Things just won’t work if the two organisations are not aligned properly, or if one party is not lifting their weight.”

He said there was always the risk of not achieving the significant benefits intended.

“There are potential disadvantages, but there’s also more flexibility [in collaborations] to opt out of those agreements if it’s not working,” he says.

Moore suggests a three-step process for examining possible collaborations, with a major step being a risk management framework. (*See Three steps towards a collaborative model.*)

Mergers issue a battle of opinions

Mr Rutherford says arguments both for and against increased mergers continue to be heard in the sector.

One view is that there are “too many” not-for-profits, and that this creates confusion and wastes resources. Some point to a 2010 Productivity Commission report that suggested the sector “should be more open to the possibilities of restructuring for forging new ways of collaboration”.

The flipside is the argument that innovation is needed to fix entrenched problems. And that often requires the creative initiatives of smaller, more nimble not-for-profits, he says.

Collaborations can address the “too many NFPs” concerns to some extent, and also avoid the pitfalls of full-scale mergers and cultural clashes between organisations.

MORE INFO

More about mergers: [*Thinking Big: To Merge or Not to Merge – That Is the Question*](#)

Web resources: [Legal help sheets and guides on the ICDA website](#) 





NDIS a survival of the fittest

Why strategic alliances, including collaborations, may be necessary

By Tony Rutherford, principal, Moores

The National Disability Insurance Scheme (NDIS) has created a tremendous opportunity for organisations to deliver services in an efficient, innovative and cost-effective way.

It has also given people with disabilities greater control over who provides their services and accommodation. It is one of the truly great social projects that Australia has ever undertaken.

Of course, like any transformational scheme, the NDIS is remarkably complex. The terrain that organisations must navigate to engage and be successful under this new model is extremely challenging.

Big issues loom for providers

As an adviser to various disability organisations, Moores is helping clients to manage their way through this complexity. A recent report from the Productivity Commission identified a range

of issues arising from the implementation of the NDIS, including the following:

- Inexperienced or unsuitably qualified personnel at the National Disability Insurance Agency (NDIA) or their intermediaries who are responsible for making life-changing decisions about the supports that NDIS participants are entitled to
- Unclear parameters around the basis for decisions of the NDIA including poor communication to disability service providers and NDIS participants
- Inconsistent decision-making and inconsistent processes for evaluating participants
- An inability of the NDIA to adjust to amendments to a funding plan (e.g. to provide additional supports and equipment that are necessary)
- A lack of clarity regarding quality assurance requirements under the NDIS
- A conflict between state and federal agencies regarding who is responsible for funding various supports during the NDIS transition
- New IT systems that are difficult and expensive for disability service providers to implement >

- Significant cash flow issues arising from the transition from upfront funding to back-end invoicing and payment, combined with inadequate funding based on the new NDIA rates.

We are confident these issues will ultimately be resolved, but the reality is that there will be no clear resolution in the near term.

That does not mean that disability organisations and people with disabilities should not continue to raise their concerns and insist on improvements to the system. Solutions must be found and all those affected must advocate aggressively for change. But change will not happen overnight.

Adapt to survive

This means that the ongoing viability of a number of organisations will be brought into question if they do not quickly adapt. Many will not survive, including those organisations that might be relatively well established and reputable providers but that do not have a balance sheet or cost structure that allows them to survive the current period of disruption. This inevitable provider instability will have significant consequences for a wide variety of people, including, most importantly, people with disability receiving services, their families and provider staff at all levels.

So how can disability organisations adjust, survive and ultimately be stronger under the NDIS?

Recent news articles have suggested that an extension of state government funding will be required during the transition period. This might provide relief in the short term, but given the gap in coordination between the NDIA and the relevant state agencies as highlighted by the Productivity Commission, and indications that existing state agencies are already moving away from funded services that are intended to transition to the NDIS, we think this is unlikely. In any event, by the time such arrangements are made, it is highly likely that many organisations will be financially weakened to the point of distress or have ceased trading.

How will things look for the sector when the dust settles?

The disability services landscape has already changed and will continue to change in the following ways. We are likely to see:

- Existing government services transferred or sold off where possible, if funded by the NDIS under the new arrangements. These services

will be acquired by large organisations with a strong balance sheet and a history of providing disability and aged care services.

- The emergence of more independent contractors (carers, physiotherapists, occupational therapists etc) where services are provided directly to people with disability, possibly via an online portal.
- The growth of start-ups that are not weighed down by legacy processes and procedures and are approaching care in an innovative way.
- The organic growth of existing organisations that have sufficiently low operating costs, partly through the NDIS and partly via alternative funding streams (such as developing businesses that sell products in the healthcare sector, using land currently owned by the organisation to develop housing either by themselves or in partnership with developers or community housing providers).
- The acquisition by larger organisations of disability service providers with a good reputation and a strong list of NDIS-funded clients.
- Formal and informal partnerships between disability and other organisations (e.g. aged care, health, IT) that involve the sharing of information, back-office systems and expertise, marketing, quality assurance systems etc.
- The winding up of organisations without the financial strength to survive the transition, with existing employees and clients being picked up by the players referred to above (or employees starting a new business without the legacy cost structures of the previous entity).

The strategy that disability organisations employ now will be central to their survival. They must be both commercial in the execution of that strategy and compassionate in managing clients and their families. Indeed, they must continue delivering quality services and ensure that client satisfaction is at the heart of everything the organisation says and does. Without this, they will most certainly fail in a market-driven environment.

From our perspective, disability service providers that are proactive in engaging with other organisations (in the disability sector and other sectors) to discuss potential efficiencies will do well. While it may not be their preference, particularly where employees, the executive and the board have invested vast amounts of time and energy in developing and managing the organisation, the alternative of being passive is far worse. ➤



The first step will require disability organisations to be clear about their strengths and weaknesses, in terms of the quality (and viability) of their services delivery, and in terms of their back-office operations and overall management. Tools like the [SVA Fundamentals of Impact](#) can provide a good starting point for assessment.

The next step will be to identify potential partners based on their corresponding strengths and weaknesses and reputation in the market and narrow this down to organisations with similar values.

Mergers and acquisitions aren't the only models

Survival and growth may not necessarily mean a full merger or acquisition. Scale does not necessarily mean success, and if at least one of the merging organisations is poorly run, the consolidation may facilitate the downfall of both organisations.

There are various models under which organisations can take advantage of potential synergies, including joint ventures and partnerships (on a project basis or in the form of a broader arrangement between two or more organisations).

The core options include strategic alliances, takeovers and true mergers.

Strategic alliances: making collaboration work

A strategic alliance allows disability and other organisations to come together, potentially under one band, and even to undertake due diligence "on the run". It can allow for project by project and flexible partnering, while working like an engagement before ultimate marriage.

Some strategic alliances can allow a new shell company to act as manager of the two alliance partners, at least in the interim, and can usually attract Public Benevolent Institution (PBI) status, even if it just manages on behalf of other entities which deliver the direct services.

Many flexible options exist here, even if the manager cannot attract PBI status. For example, NDIS services may be able to be rolled into the new entity to give it the opportunity to provide direct services, while other state-funded services remain in the original entity and run out without interruption or threat of re-tender.

Strategic alliances can take a number of forms, such as joint ventures, partnerships, co-location or co-operatives. The article [Collaboration a merger alternative](#) examines these in more detail.

Takeovers: acquiring a bigger service

A takeover can offer the distinct advantage of preserving hard-to-get and hard-to-keep tax concessions, including PBI status. The entity acquiring the other provider does not necessarily jeopardise its status by taking on another entity, provided the objects are sufficiently similar and benevolent. But this can be offensive to takeover targets, who are concerned for their mission and staff, and want to achieve a more equal partnership.

True mergers: combining forces

These must always be mergers of like-minded bed fellows, and the early application of the [betterment test](#) is key.

Well-considered mergers will give the respective organisations sufficient scale and efficiencies to thrive in the market and take the place of those organisations that have fallen away during the transition period.

In some cases, a full-scale merger will make sense after an initial partnership or joint venture arrangement to allow organisations to evaluate the cultural and financial "alignment".

The free publication [Thinking Big](#) looks at mergers between not-for-profits in more detail.



And a final thought

Regardless of the form of partnership, due diligence will be required. Risks and responsibilities will need to be appropriately allocated between parties, and this will need to be documented. General commercial principles plus principles that apply to not-for-profits should guide your appetite for risk. 



Three steps toward a collaboration model

Step 1: Scope your collaboration

Want to assess your organisation's potential for collaboration?

Ensure you've got a business plan that details your:

- vision and purpose
- human and financial resources
- analysis of the organisation's key assets
- time frames for achieving outcomes.

Prepare a business case that examines the details of a proposed collaborative structure, to make an informed decision about whether the idea is viable. This covers:

- likelihood of success
- costs and benefits
- risk assessment
- attributes and suitability of potential partners.

Identify need and purpose

Identify the purpose of a collaboration. For example, your purpose might be to:

- Modify service delivery (e.g. new shared service)
- Maximise resources (e.g. co-location of service outlets, shared functions, shared information, shared training)
- Develop policy at an organisational or

community levels (e.g. collaborative policy development and advocacy through a peak body)

- Develop systems and change through changed relationships between organisations (integrated cross-agency referral systems)
- Develop social and community functions (e.g. a local committee that plans agency participation in community awareness week activities)
- Form a partnership to undertake a one-off activity or project, or longer-term activities or a series of projects.

Identify values

For effective relationships to develop, there needs to be alignment of goals and values, and a basic agreement about:

- the purpose of the collaboration and what the organisations will try to achieve together
- mutual expectations about outcomes and processes
- the principles or values by which the partners will operate. These principles need to include agreements to operate with transparency and openness in dealings with one another.
- leadership at relevant levels to set the vision, the direction, principles and a culture of collaboration ➤

- clear parameters for the collaboration, and roles and responsibilities of the collaborating partners
- regular and meaningful communication
- agreed processes for problem solving, non-adversarial dispute resolution and partnership termination
- the need for flexibility to respond to change and to be innovative, while maintaining focus on the initiative's main objective.

Step 2: A collaboration arrangement

Develop a risk management framework

Here's what you need to do to manage your risks:

- Investigate risks arising from the collaboration, including possible impacts on service users and staff
- Consult relevant stakeholders
- Implement risk treatment and mitigation strategies.

Step 3: Document the deal

Formal arrangements between organisations should be documented. The type, extent and complexity of the documentation required will depend on the type of relationship being formed and the purpose of the collaboration.

Documents might take the form of agreements, partnership agreements, or memoranda of understanding.

Agreements that are usually legally enforceable include joint venture and partnership agreements.

Protocols, by comparison, aren't usually legally enforceable, but are a practical, hands-on way to outline specific processes and procedures that parties should meet. These can include:

- documented inter-agency procedures
- protocols regarding management and service arrangements for co-location
- case management protocols for the roles of the agencies for clients with complex needs.

A memorandum of understanding (MOU) is the least formal type of collaborative agreement, but may not be the most appropriate for an organisation seeking a legally binding and enforceable arrangement.

The legal status of an MOU will depend on its terms. In some cases, a detailed understanding that includes important terms such as the exchange of money might be considered a contract.

MOUs are typically employed by NFP organisations wanting to co-operate and share information. 

This article is based on information presented by Moores at a not-for-profit sector briefing earlier this year.



Grants in Australia 2018

Our national survey is now open (closes May 7)

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PARTICIPATE IN THE SURVEY TO WIN!

The banner features a blue background with yellow and blue dots. On the right, there is an illustration of a laptop with a megaphone icon on the screen, and a speech bubble containing the text 'PARTICIPATE IN THE SURVEY TO WIN!'.



The Impact Assembly helped a collective impact effort dubbed “The Hive” in Sydney’s outer west to concentrate its energies.

Generating change with The Impact Assembly

By Matthew Schulz, journalist, Our Community

Collaboration between community, not-for-profits, business, government and philanthropy is the only way we’ll solve our biggest problems, the chief of a social enterprise dedicated to joint effort says.

The Impact Assembly’s founder and director, Liz Cameron-Smith, is passionate about the enterprise’s mission, a child of the second biggest professional services firm in the world, PwC, late last year after several years of testing.

And the brainchild of an organisation with a pedigree of cracking problems for government and big business is now turning its attention to the toughest issues facing society, such as homelessness, suicide, chronic health issues, youth unemployment, educational disadvantage, and Indigenous inequality.

The enterprise employs a PwC method dubbed “The Difference”, honed by techniques mastered

by commercial consultants for use in high-powered boardrooms.

But instead of just corporate bigwigs, Ms Cameron-Smith and her team bring together groups that include not-for-profit leaders, philanthropists, workers, clients and people “at the heart of the issue” to “connect the dots” in a neutral setting to “create solutions”.

She says the ambitious agenda is a deliberate strategy, because many entrenched social issues aren’t going to be solved by “isolated action”.

“My question is: How else are you going to get change to happen?”

And she is firmly of the view that it is collaboration that will generate systemic change.

One major project has brought together mental health organisations across the country to tackle suicide.

Ms Cameron-Smith says several CEOs were already meeting in cafes in a bid to “align their efforts” when one of the organisations was referred to the relatively new service.

Already the project has expanded to include more organisations, which have agreed to an >

agenda that involves regular meetings, creating a “collaborative culture”, and setting some “high impact initiatives” in train to trial their work.

The Impact Assembly is also working with a group trying to forge a national approach to tackling of obesity, but it’s doing more than facilitating the group.

She says as well as working with The Impact Assembly, PwC has deployed consultant to analyse the obesity issue, including how much failing to act will cost us all.

“We know that the skill set we have around design and facilitation is one part of the way you can enable collective effort, but often they’ll need other skill sets as well, whether they are legal, economics, communications, IT.”

She says The Impact Assembly actively seeks out about half its clients in a bid to find the “messy” social issues, rather than wait for them to arrive on their doorstep, and the other half approach PwC directly for help.

A critical part of making these collaborations work is using different styles of joint effort between sectors, such as not-for-profits and business.

“We want to move beyond traditional models of corporate social responsibility, such as the ‘one day of volunteering a year’, and instead look at how we pool volunteering and package it up around particular projects that feed into more systemic change.”

She believes the old methods of a day of volunteering by big companies “are numbered”, largely because organisations realise “they’re not creating a lot of impact”.

“Most of them want to engage in a more meaningful way ... and on the flipside, big not-for-profit organisations have had enough of that sort of model, because it’s often more of a burden than an asset.”

Instead, she says, a more effective joint effort sees groups deploy the “strengths and assets of the corporate sector to support social change”.

She believes business and not-for-profits don’t have a choice but to cooperate on the big issues. Not-for-profits need help to achieve their missions, while the corporate world will continue to lose the public’s trust unless they’ve got an authentic commitment to good.

And that cross-pollination must spread further to have the biggest effect, she says.



Liz Cameron-Smith says organisations must collaborate if they’re serious about change.

“The majority of the groups we work with are working across community, business, government, not-for-profit and philanthropy.

“This really has the chance to drive completely new ways of working, because you’re combining the strengths from different sectors to come up with much more innovative ways of thinking about tackling a problem.”

She gives as a theoretical example a not-for-profit seeking a corporate partnership to tackle homelessness. >

“This really has the chance to drive completely new ways of working, because you’re combining the strengths from different sectors to come up with much more innovative ways of thinking about tackling a problem.”





The Hive has demonstrated the success of the Collective Impact approach to social intervention.

“If that corporate was to send a few people to volunteer in a soup kitchen, that’s only going to have so much impact. But instead imagine it’s a bank. Think about the data that a bank has access to, and the way they can predict when someone might be at risk of falling into a housing crisis.

“Imagine how powerful that data set could be to enable a not-for-profit to figure out at what point to provide support to people who are at risk.”

She says a solution might mean pressing the bank to shift its policy away from “pushing someone over the brink and into ... homelessness” and towards offering products that could help those at risk.

“We have to find ways of business to contribute in a more meaningful way,” Ms Cameron-Smith says.

These kinds of models require organisations to adopt methods such as a “systems thinking mindset” and models such as “[Collective Impact](#)”, which was developed in the United States and has had some take-up in Australia.

Ms Cameron-Smith says PwC helped with one project known as The Hive, a collective impact effort by Uniting Way, the NSW Government and the Ten20 Foundation, in Mt Druitt, in Sydney’s outer west.

PwC’s role was to host a two-day event “that helped them build the case for change”, partly by finding common ground among a large number of people with “diverse views and different



WATCH NOW: [How The Impact Assembly works](#)

agendas”. PwC continued to work with the group for another 18 months to refine their vision and strategies.

“We know that collaboration is hard, and to make it work effectively, it is important to have that collaborative infrastructure, because usually it’s not anyone’s day job.”

“We make it our job to think about how you engage people, how you navigate those complex dynamics and move from talk to action.”

MORE INFO

[More about the PwC method](#) 

Pro bono partnerships power free legal help

By Matthew Schulz, journalist,
Our Community

Not-for-profit legal centres on opposite sides of Australia are making the most of partnerships with big legal firms to get better results for their clients.

The [Street Law Centre](#) in Perth and the Inner-City Melbourne Legal Centre may be thousands of kilometres apart, but their needs to give their clients the best advice with limited resources couldn't be closer together.

Street Law Centre is an independent, not-for-profit community legal centre. Its mission is to provide free legal information and advice to people experiencing or at risk of homelessness, and it also pushes for legal reforms.

Street Law's principal solicitor, Ann-Margaret Walsh, says four law firms provide help to the organisation: Corrs, Chambers, Westgarth; King & Wood Mallesons; Ashurst; and Jackson McDonald. She estimates their pro bono help is worth more than \$400,000 a year.

Each of them provides law graduates and "restricted practitioners" as workers on secondment once a week for up to six months. A significant part of that work is helping with Street Law's outreach legal clinics in Perth and Fremantle, as well as the casework that inevitably follows.

Each firm is linked to one of four clinics, which themselves are joint ventures with community organisations such as Uniting Care West, Ruah Community Service, the St Patrick's Community Support Centre, and Passages Resource Centre (a joint Vinnies and Rotary effort).

"These partnerships increase our resources significantly and go towards ensuring our high-level service delivery," Ms Walsh says.



Street Law principal solicitor Ann-Margaret Walsh

"These partnerships increase our resources significantly and go towards ensuring our high-level service delivery."

At the same time, the secondees get the real world experience they need in their profession.

Street Law says in the past financial year, the secondees contributed 1443 hours.

Ms Walsh says that while of course the help is welcome, it means a core service is reliant on those partnerships, which also means that if the organisation wants to expand its services, "we need to continue to find law firms dedicated to partnering with us in this way." >



Graduate lawyer Hannah Fessah has learnt more about workplace law under the wing of legal giant Clayton Utz

King & Wood Mallesons solicitor Rachael Coffey counts volunteering at Street Law as an invaluable part of her career development.

Volunteers, she says, are afforded autonomy and a greater variety of work than law firms could provide, and get a chance for more face-to-face dealings with clients.

“Attending the outreach clinics ... gave me a chance to ‘put a face to the file’ and understand the clients’ circumstances more,” she says.

She says that having greater responsibility increased her abilities.

“I think this is what is also so valuable about volunteering at Street Law. You really take responsibility for driving a client’s matter and that gives you an opportunity to develop your drafting and communication skills.”

Workplace law the focus at inner-city community practice

Inner Melbourne Community Legal (IMCL) has taken a novel approach with legal giant Clayton Utz to provide an employment law service that also builds its capacity to do better for clients.

Where some other legal centres might rely on pro bono lawyers running legal clinics independently, IMCL and Clayton Utz jointly offer employment advice at a new fortnightly clinic.

The community legal centre’s role in these clinics is to “facilitate client interaction” and help the bigger firm to understand the nuances of conducting legal work in a community setting.

At the same time, Clayton Utz provides high-level

legal assistance tailored to each client’s needs. This might mean working on Fair Work claims, negotiated settlements, complex court matters, or accompanying the legal centre’s lawyers to conciliations to provide on-the-spot strategic and procedural advice.

Expert employment lawyers from Clayton Utz have mentored lawyers such as Hannah Fessah, a graduate lawyer at the community organisation. Ms Fessah helped fight for the rights of her client “Ashika”, who was forced into a sham contract and then sacked when she challenged her boss.

Clayton Utz senior associate Ruth Thevathasan says that Ms Fessah “has actively engaged with >



Inner Melbourne Legal Centre chief Dan Stubbs has seen the benefit of working with big firms.



the guidance and support provided by Clayton Utz to become an effective advocate for the workplace rights of IMCL clients”.

Ms Fessah agrees the lessons have been “an invaluable way to build up our own skills internally by learning from some of the leading employment lawyers in the state”.

“We can be confident that we will, in turn, provide the same level of legal help. This means that high quality representation through the entire lifecycle of a legal matter is not exclusively accessible to people who are able to afford it.”

IMCL chief executive Dan Stubbs says matching clients with expert lawyers is a collaboration that benefits the legal centre, the big firms and, most importantly, the clients.

“The big firms recognise that they have a role to play in providing access to justice, particularly for the vulnerable individuals that organisations like IMCL target.

“Their pro bono work is something that some of the large firms promote to clients and prospective employees to illustrate the seriousness with which they take their community-social responsibility.”

He says it makes sense to target the employment law area.

“Employment law is an area in which large firms have expertise and so it provides a real opportunity for them to assist IMCL’s clients compared with other areas of corporate law.”

He has some important suggestions for others considering the model.

“Plan, implement, then review and revise,” Mr Stubbs stresses.

“Just because the firm has expertise, and we know we have clients with that need, does not mean it just works. We must plan to ensure we

each know the limits of our capacity and then review how the program’s working and change it to ensure it’s meeting its objectives.”

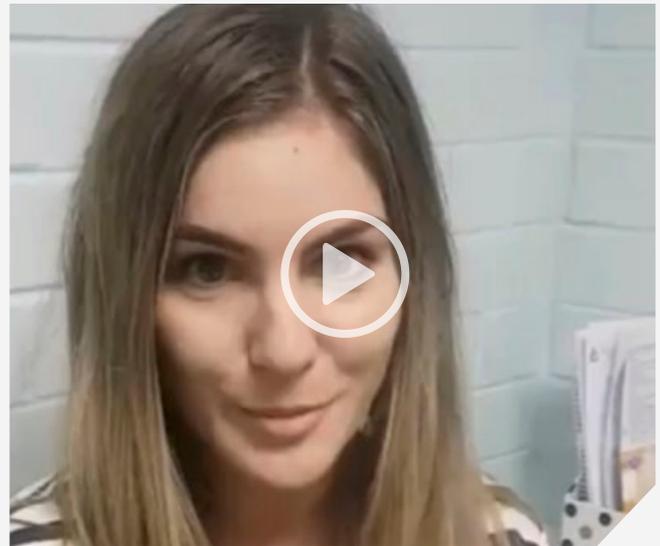
He says there’s a final test of how well the whole model is working.

“We must continue to come back to whether the collaboration is benefiting vulnerable clients.”

Ashika certainly found the partnership worked for her, saying she is “proud of having stood up to bullies”, and the success of her case meant “I was able to make a stand for everyone”.

She says working with the community centre and their pro bono lawyers had given her courage, and made her “a stronger person”.

“Without their support, I wouldn’t have been brave enough to take steps against my employer,” she says. 



WATCH NOW: Mila talks about her time as a volunteer (Facebook video)



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Jocelyn's mission to end family violence

By Matthew Schulz, journalist, Our Community



McAuley Community Services for Women CEO Jocelyn Bignold.

Renowned community sector administrator and advocate Jocelyn Bignold has seen the best and the worst of people and knows what it takes to tackle the hardest issues.

The Diploma of Business (Governance) graduate talks to us about her mission, her motivation, and what it takes to be a good community director.

Desperate women and their families facing the worst times of their lives have people like Jocelyn Bignold to thank for giving them hope, but they are also the people who drive her to do better.

Sure, the website for McAuley Community Services for Women – where Ms Bignold is the chief executive from its base in Melbourne's inner-west – explains the service “provides much needed services for women and their children who are escaping family violence, and for women who are homeless”.

But that hardly paints a picture of the woman and her child who phone the service from their car, desperate to escape a murderous husband who has torched their home, or the young woman who's been secretly locked in the ceiling unknown to the rest of the family.

Or the woman forced into virtual slavery by her own family, working for their business, yet left to scrounge for scraps in bins to feed her own five children.

Others have found themselves in the safe hands of McAuley on being discharged from hospital – sometimes a psychiatric ward – having escaped a violent situation.

These are the stories burnt into the thoughts of Ms Bignold as she follows the path laid down by Catherine McAuley, who founded the Sisters of Mercy.

And it is Ms Bignold, the McAuley team and the board who are charged with picking up the pieces of broken families in the aftermath of violence, after the news crews have packed up their cameras and notebooks.

McAuley's crisis and longer-term accommodation, employment help, and even social and recreational support for women and children are the kinds of services that turn people's lives around. And that is what gets Ms Bignold up in the morning.

Professional mission is personal

A community sector worker for more than 25 years, Ms Bignold says her personal mission is focused on “the prospect of change: how we might be able to influence things for the better, or simply provide an opportunity for a woman or child that they didn't have yesterday.”

She aims to do that in her work.

“I've led a very privileged life and have been able to access continuous education, and ever more challenging roles. I don't have a huge amount of time in life to do something that makes the world a tiny bit better place – my professional life is where I try.”

“I've spent my professional life in the community sector, working with and alongside people who >

are more materially disadvantaged than I am.”

That, she says, has taught her about “the ‘sameness’ of all of us”, and that professional mission has been to build access to the universal needs of housing, employment, acceptance and family.

Before McAuley, Ms Bignold worked for a long time with Melbourne City Mission, particularly with women leaving prison.

That exposed her to the fact that most of those women had been abused in one way or another, leaving “an extremely hard and lonely trek to access any of those basic building blocks to a happy, healthy life”.

She says she doubts she would have achieved what she’s done outside the not-for-profit sector.

“I suspect my focus would be directed differently without the ‘exposure’ to people that I have had, and therefore I may not have tried so hard,” she says.

The stories of some of those people remain with Ms Bignold as she goes about her mission, and they drive her to push for change.

“One where a woman was locked in the ceiling of her family home for an extended period of time without the other family members knowing. It was such extreme cruelty and deprivation at a very young age (and) which ended in a life of crime.”

“It creates the motivation to do what’s possible to make society better for the next person. One way of dealing with it is knowing that I’ve done my best to meet the person halfway ... with everything at my disposal to make the situation better.”

Knowledge, culture, advocacy the keys to solving tough problems

Making the situation better, she says, includes wanting to “get to the bottom of an issue” to understand why things are the way they are, and to advocate for social policy change if necessary.

That examination has meant travelling overseas, where Ms Bignold has learnt “that some are ahead of us, and we are ahead of others”.

“I’ve been galvanised by the courage of countries like Spain to call violence against women for what it is and not hide behind more ‘palatable’ language. I’ve been reassured that we are on the right track in relation to building an integrated service model within the organisation.”

But she says she’s also seen more efficient ways of cross-sector collaboration and co-operation, and she remains determined to “pin that down”.

While she was reluctant to reveal too many

“If you know where and what the mistakes are, hopefully you will learn to do things differently, and perhaps more successfully in the future.”

details, the organisation is working with Deloitte Access Economics to do more with its “outcomes identification” and tracking work, which she believes will create a “major breakthrough for us”.

Asked about the big issues facing the not-for-profit sector, Ms Bignold nominated several.

“One of the biggest issues is continuity of funding to do things that are known to work well, and that also means to be able to work in a holistic way when funding has been siloed into prescribed areas, with no flexibility.”

Social services “rarely shy away from a challenge and are often incredibly innovative [but]... there are times when they need to ‘hold steady’ and not succumb to the latest political trend.”

And she said not-for-profits will need better technology infrastructure to get their work done and measure their outcomes.

“We need the tools and models for good governance and must resist the push to let ‘market forces’ decide what’s best for the human services.”

Of course, Ms Bignold understands better than most that “culture” is the key to change, having travelled a sometimes difficult road helping create McAuley, which was formed as a result of mergers.

Ms Bignold admits she initially underestimated the challenge of merging several different work cultures, before calling in expert help to successfully transform the organisation.

She says admitting her mistakes was the right thing to do, even doing so at a conference for community directors a couple of years ago.

“Very little can be achieved without understanding the culture of where you are; all the hard work, investment will come to nothing if the people you are working with don’t understand, ➤

and agree with, what you are trying to achieve.”

“If you know where and what the mistakes are, hopefully you will learn to do things differently, and perhaps more successfully in the future. Perhaps it also makes a leader more ‘human’ and allows others to feel more confident to participate in the solution.”

She says community directors, too, need to be human in the way they approach their work and urges board members to “support their organisation 100% emotionally.”

She also advises, “Be present, be engaged, learn and understand; open doors to others where you can, be happy, be enthusiastic. Listen to others. Bring resources if you can.”

Diploma’s lessons for the experienced

Despite having more than 25 years of experience in the community sector, McAuley Community Services for Women chief executive Jocelyn Bignold, a graduate of the Diploma of Business (Governance), accepts she still has more to learn.

Why did you decide to undertake the Diploma of Business (Governance)?

My role was taking me more routinely into governance and I was keen to integrate practice with theory.

I wanted to test out that what I was learning “on the job” was aligned to what the literature said. I also wanted to ensure I wasn’t operating with knowledge gaps, and I wanted to see what was new that I should be learning, to remain relevant and up-to-date.

I chose this course because of its focus on governance and the nonprofit sector.

Was the diploma what you expected?

It was better than expected. I was thinking too narrowly about governance. It gave me a framework to help me structure my thinking about my role, and the organisation’s needs.

The notes were particularly good. I keep going back to them and I liked the links to other reading embedded in the material, so that I could explore further if I needed.

The resources are enduring and help well beyond the classroom. It helps me retain information and refocus when I start to lose track. I’m glad I did it, and am now looking to build on it.

It has given me more confidence in what I was doing, and what I needed to do, and I liked the fact that fellow students came from a wide range of community sector organisations.

The diploma’s comprehensive nature, and its foundational structure of governance, would give anyone a good grounding.

What are the three key things you learnt?

- The diploma reinforced and expanded what I knew about stewarding an organisation.
- The beauty of plain English and not using jargon.
- For the first time, I really came to grips with what culture was and how important it is in an organisation, and its relationship to change. 

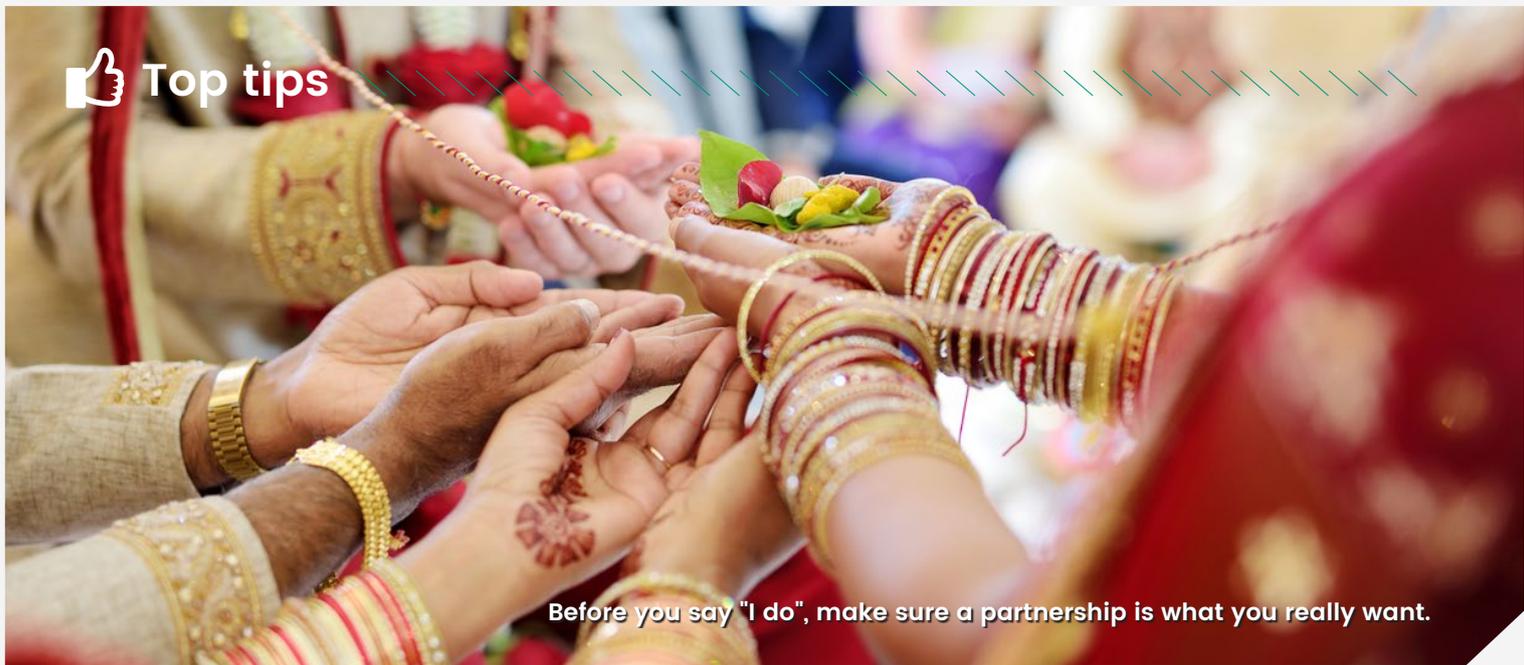
“The resources are enduring and help well beyond the classroom.”

You can change the world

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Diploma of Business (Governance)





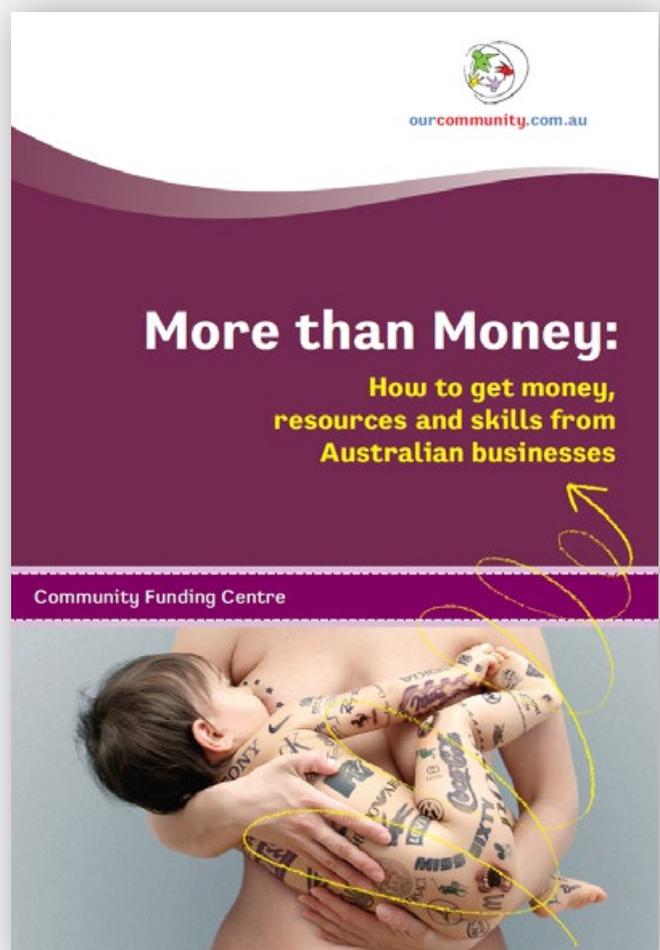
Before you say "I do", make sure a partnership is what you really want.

50 tips for finding and keeping the right partner

1. Make sure a partnership is what you want. There are many relationships your organisation can have with a business – it doesn't have to be a partnership.
2. Choose a model or models that suit you and your partner.
3. If you can't find the partnership model that suits, create a new one.
4. Make sure you are ready for partnership – a thorough self examination is critical. You must have the time, resources, and commitment.
5. Know your own worth! Value all that you have to offer a partner and spruik it.
6. Do your homework! Research your target partner – what do they have to give, who do they partner with now, what's their criteria for partnership?
7. Do a reference check – trust us, they'll certainly be checking up on you.
8. Make sure your values match. A partnership is set to fail if the partners don't share the same basic values.
9. Haunt the places potential partners hang out – chambers of commerce, business clubs, services clubs.
10. Be absolutely certain and confident about what you want and what you have to give.
11. Make it easy for them by putting your partnership proposal in their language and keeping it simple.
12. Find out the main business drivers for partnership for your partner, and use them to your and their advantage.
13. Give them plenty of time to assess your proposal and make a decision.
14. Don't be shy – tell them about your achievements, be your own best referee.
15. Demonstrate that you are a good operator and run a good outfit.
16. Understand that every business will have unique needs from a partnership – there's no such thing as one size fits all.
17. Don't shirk on the planning – invest time and resources in a planning workshop.
18. Have a partnership vision – it's not just fluff, it is the statement which sums up the reason for your partnership's existence.
19. Be selfish in your objectives and expect and encourage selfishness from your partner. The very best and most successful partnerships meet the needs of all involved.
20. Be clear about who is doing what. Having roles and responsibilities decided from the outset is very important.
21. Map your resources. So many partnerships fail because partners have failed to understand what has to be resourced and how to do it.
22. Measure everything that is measurable. ➤

23. Agree upon your key processes, especially conflict resolution and partnership review.
24. Plan your exit from the start. Agree upon an exit strategy including an out-clause in case things go very wrong.
25. Document everything. It's boring, but it's important.
26. Dedicate time to creating a partnership agreement that protects both you and your partner.
27. For a partnership that involves significant funding or other resources, it is worthwhile getting legal assistance for the agreement.
28. Progress reports are invaluable. They give you a snapshot of how your partnership is tracking and keep all the necessary information in one document.
29. Always be diligent in all matters financial.
30. If you are struggling with the financial reporting requirements of your partner, ask them for help. They will appreciate your honesty and you will learn some new skills.
31. Communication is the key to success – communicate in the way you would like to be communicated with.
32. Put down that electronic device and pick up the phone!
33. Be even more daring, put down the phone and go see your partner!
34. Ask for feedback and give it in return.
35. Touch base often and keep your partner informed with updates.
36. Have one key communication lead for each partner and delegate this responsibility if the lead is not around.
37. Always remember that if you think your partner might need to know, they do need to know.
38. Say thank you.
39. Invite your partner to special events and treat them like a VIP.
40. Remind your partner of what they are supporting – being involved is far more compelling than statistics and reports.
41. Tell the world – no one will know about the amazing things your partnership is doing unless you tell them.
42. Have a party. Celebrate all the little achievements along the way.
43. Review your partnership regularly.
44. Things can go wrong – look out for the warning signs and head off trouble.
45. Address conflict positively and with an open mind.
46. Stand by your mates. Don't do a runner the minute things look bad for your partner. A good partner will try and help wherever possible.
47. Juggling multiple partners is possible as long as you can resource proper management of them.
48. The end of a partnership is not a bad thing – remember to celebrate that too.
49. If your partnership ends badly, maintain your dignity. You will always be remembered for your good behaviour and this will help attract other partners.
50. Partnerships can be as creative as we want them to be, as restricted as we let them be, as innovative as we allow them to be. ◆

(This is an extract from [*More than Money: How to get money resources and skills from Australian businesses*](#), published by Our Community, \$36.)



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