



Strategic Alliance Fund

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Management Fund of
Waukesha County*

PARTNERSHIP AND PROGRESS

UNITED WAY IN WAUKESHA COUNTY

Merger Case Study

In June 2007, the United Way in Waukesha County and the Volunteer Center of Waukesha County announced their decision to merge. The Volunteer Center became a division of the United Way, while retaining its own brand identity. This new partnership offers many advantages for the community.

The combined fundraising, marketing, and operational functions create significant cost savings, but more importantly, the synergy creates potential for philanthropy and volunteerism to improve and expand.

In 2004, the United Way in Waukesha County began to transform their business model from focusing on fundraising to changing community conditions. This change also highlighted the opportunity for the United Way to mobilize non-cash resources such as people, time, talent, relationships, expertise, and technology.

The Volunteer Center was aware of United Way's new business model and began discussing ways in which they could be involved in this new work. The Volunteer Center approached the United Way to explore collaboration opportunities to better serve the community. Nationally, one-third of Volunteer Centers are incorporated into United Way operations, and many of these merger examples were reviewed. Volunteer leadership from both organizations visited the United Way of Dane County where the Volunteer Center became part of United Way in the 1970's. Both organizations learned a great deal during the visit and went back to the respective Boards to request the establishment of a Task Force to further discuss opportunities for collaboration.

Four representatives from each organization's Board were appointed to serve on the Task Force and a consultant was hired to facilitate the meetings and process. The consultant worked with each organization individually to ensure that the motives and expected outcomes were aligned and compatible.

With over 100 years of combined service to the Waukesha community, the Volunteer Center's experience mobilizing volunteers, and United Way's commitment to improving lives and making lasting change in the community are directly complementary. Both organizations realized the potential to engage more nonprofit agencies, local businesses, and young leaders in volunteerism if they worked together. It was mutually acknowledged that engaging donors first as volunteers leads to increases in philanthropic giving.

The leadership for both groups were excited about sharing their common goal to engage more youth and emerging leaders in the community. United Way has developed opportunities for those entering the work force or new to the community to serve, learn, and lead. The Volunteer Center's commitment to youth service learning adds a continuum of service from elementary aged children through generations X & Y. Overall, the decision to merge was truly driven by mission, emerging needs, and a commitment to continuous improvement.

Although the experience was generally very positive, many hours were dedicated to the process. The Task Force volunteers and leadership staff met every two weeks for about a six-month period to develop an agreement outlining the relationship and operating structure. This additional time commitment, combined with the ongoing work of both organizations, created a stressful pace, especially for staff.

In hindsight, hiring an outside consultant to facilitate the discussions was a very good decision. The consultant managed the process, provided a focused approach, and brought a neutral perspective. The facilitator asked tough questions to ensure that the Task Force members owned the process and fulfilled their commitments.

Engaging and integrating the Board leadership was vital to the merger's success. The Boards approved a new strategic vision, and United Way changed its bylaws to expand its Board by three positions, which were filled with Directors from the Volunteer Center's Board. Other Volunteer Center Board Directors were encouraged to join standing committees.

Integrating a new organizational culture is a continuing process of communication and relationship building. This includes listening to and understanding the hopes and fears of the staff and gathering ideas on how to best implement the transition. Therefore, a communications plan was put in effect to seek advice and opinions from key stakeholders, articulate the benefits of the merger, and announce the merger to the community.