

Collective Communities Leadership Model

COLLECTIVE COMMUNITIES CASE STUDY TUATAHI

Two leading national disability organisations merged from July 1, 2021.

INSPIRE

Collective Community leadership models are partnership models involving multiple organisations working together to achieve a collective community focused outcome, driven from governance structures and processes.

Models that are currently successfully operating include:

- “Uber” boards created through mergers of organisations who have decided to work collaboratively to achieve greater community impact
- ‘Umbrella” boards created when clusters of organisations decide to align their strategies and then delivery
- “Partnership’ boards where the board and organisation leaders collaborate with other community leaders across the business and government sector
- Distributed leadership, where boards actively draw on their community to support decision making (this aligns to many decision-making structures and principles of Māori governance)

The focus of this case study is to demonstrate to organisations that collective community leadership models are not only possible, but are already enabling many organisations and communities, locally and globally, to thrive. Where possible, providing a framework that organisations can use to adopt a collective community approach.

This case study is the first in a series of “gifts” that we have developed to share knowledge and encourage courageous conversations at the board table.

Collective Communities

The world is facing a time of unprecedented change and challenge. With the current model of working, many businesses and community organisations are trying to tackle big problems and are trying to do it alone. Each are individually investing time and resources yet collectively looking to achieve aligned outcomes.

Challenges such as Covid 19 have demonstrated to many organisations the need for collective solutions. This, combined with an increasing expectation of businesses being more engaged with their communities, calls for a new way of doing things. A collective community leadership model is about partnering between those seeking to achieve the same outcomes and working collectively to achieve these. This case study is a first of several Community Governance NZ national action plan is delivering. This **case study** demonstrates courage, ego-less leadership and how working to your purpose is crucial to adapt and thrive.

This case study shares their story and success.

Two leading national charitable disability organisations merged into one organisation from July 1 2021.

Introduction

Life Unlimited Charitable Trust (Life Unlimited) and Access Ability Charitable Trust (Access Ability) are both charitable trusts with a long involvement in the health and disability sector throughout New Zealand.

Both organisations agreed to merge into one organisation from July 1st 2021. This merger will position them as a new organisation for the future which includes upholding the rights of disabled people to take control of their own lives.

About Access Ability and Life Unlimited

The Boards of Life Unlimited and Access Ability have met and agreed that their strategic purposes are well aligned and together, they can be stronger in their delivery to create a new organisation.

The new organisation will be fit for the future and responds to transformed thinking of how the rights of disabled people are upheld and the needs of disabled people and their families and whānau are met.

Access Ability employs 50 people to provide Needs Assessment and Service Coordination (NASC) and Local Area Coordination (LAC) and provides research, training and advocacy on disability-related topics and issues.

Life Unlimited employs 80 people and alongside NASC and LAC services they offer health and disability information, advice and equipment and deliver professional development on Autism.

Both charitable organisations offer needs assessment services in regional locations across New Zealand.

Why they merged

The disability sector is about to face significant change with the introduction of an enabling good lives model. Both organisations' are key players in the area changes would impact. Together they could play a significant role in a new model of disability support that puts the disabled person and their family/whānau at the centre of decisions impacting their life. By coming together, they could jointly have the resources to start making the changes needed themselves, readying the workforce for a new way of working and demonstrating their willingness and ability to be part of the new system.

The first critical step was ensuring the leadership team and boards agreed that a merger was the best option to fulfil their vision of supporting disabled people to lead a good life.

Both charitable organisations had a Chief Executive in place, and both had boards and Chairs in place to govern their organisations.

Speaking with CEO Meghan Thomas of Life Unlimited Charitable Trust (Life Unlimited).

"Together we want an organisation that is fit for the future and responding to transformed thinking of how to uphold the rights and meet the needs of disabled people and their whānau," says Ms Thomas.

Both organisations needed to make smart decisions to fulfil their vision.

At the management and board level they understood it did not make sense to compete against one another's organisations. If the nature of future thinking meant things needed to be done differently these were the two CEO's and boards to do it. Both organisations:

- understood their stakeholders at a funder level and at a partnering level
- understood competition does not breed success
- understood working together could be advantageous

The CEO's, board and Chairs made smart decisions; they brought in experience and expertise at the right time to ensure board decision making resulted in success.

A well thought out transition phase was introduced to ensure both organisations took their staff, management, and governance boards with them on this journey. Good communication and management processes were critical in their success to ensure all merger discussions were communicated frequently to all staff (there were no loss of staff throughout this merger),

In this transition phase a hand over of the guard was created, for the experienced chairs to ensure wealth of information and institutional and governance knowledge could be left in good hands and this wealth of knowledge was valued and respected as they merged into one organisation.

As part of this transition a governance framework was proposed by an independent consultant (Dr Jo Cribb) who was brought in to develop an agreed board process to support the transition phase to move from individual organisations to one board.

“Good communication and management processes were critical in their success...”

The recommendations put forth to govern as one body outlined a governance framework that would be:

- an Independent Chair; and
- six trustees that will be selected against an agreed skills and competency matrix (including disability leadership and cultural diversity) that will be agreed by the merger committee.
- best endeavours are to be taken by the independent Chair to ensure equal balance of representation from both organisations, ensuring the skills and competencies matrix are achieved to the best extent possible, and,
- the new Board reviewing the Life Unlimited Trust deed to ensure that the charitable purposes accurately reflect the strategy and positioning of the new organisation

Impact for both organisations

Both organisations have now merged, they have agreed to work on a branding exercise to consider the best name for the trust and sub-brands to effectively position the new organisation. Recognising the importance of keeping staff, management and board members engaged within the decision making, through the transition and merger was priority for the board and leadership team.

Life Unlimited would remain the interim name for the new organisation but work would begin immediately on a consultation process with staff, service users and stakeholders to consider the best name for the trust and its sub-brands to effectively position the new organisation.

What we can learn from these organisations – lessons learnt

The merging of Life Unlimited Charitable Trust (Life Unlimited) and Access Ability Charitable Trust (Access Ability) demonstrates smart thinking, commitment and ego-less decision making.

A few key lessons learnt are:

- communication is critical, ensuring board and staff are engaged on the journey
- the time taken in working together without being fixed on the end outcome (i.e. don't assume merging is the best way to go) is critical in building understanding, trust and connection
- once you decide to merge you need to be decisive and ensure there is clarity on roles
- expertise – bringing in critical thinking is important helps to bring impartiality to the board table.

Pathway to success

- there were no job losses, or staff leaving both organisations throughout the merger
- a transition for the new board is underway with the Chairs of both organisations continuing to provide a smooth transition
- an independent interim chair will be appointed and six trustees, drawn from the existing trusts, will provide governance from July 1, 2021.
- ensuring the Enabling Good Lives principles are at the heart of the new organisation
- the merger allows operational and strategic outcomes to be met over a wider area, guided by trustees' decision-making

Most importantly, both had their people at the heart of what they do and both organisations clearly understood who they were there for, both organisations understood their purpose and vision, both organisations had strong outreach and community/region and both organisations had bigger goals and aspirations.

These case studies are critical thought pieces designed to share new ways of working in a governance space.

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