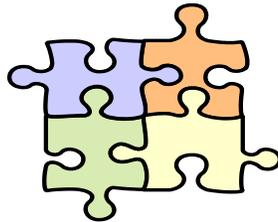




A Framework for Success for Nonprofit Federations *Revised*



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Introduction

A Revised Framework for Success for Nonprofit Federations

While the structure of most nonprofit federations is articulated in bylaws, policies and agreements, staff and Boards continue to struggle with the management of the structure. Tension and stresses emerge as national, provincial, regional and/or local partners agree to a federation model, but then those partners resist elements of it or question the value-added of being a part of it. In many instances, federation partners don't know where to start the search for solutions or how to frame the issues. As a result, federations may focus on the wrong problem. For example, considerable time and energy is given to fixing the structure, when the real issue is with ineffective processes or cultural issues, such as poor communication, tension in values or perceived disparity in power.

The literature on governing and managing a nonprofit organization does not consider the added complexities of a federation model. Federations are by nature more complex because of the requirements of shared governance, interests, responsibilities and control. In fact, there has been very little research that focuses specifically on the unique nature of nonprofit federated structures.

In the study of twenty three nonprofit federations, the author identified the key organizing principles and factors that contribute to success. The research looked at the challenges and inherent tensions of preserving the autonomy of local organizations while creating an effective, efficient and accountable movement. 'A Framework for Success for Nonprofit Federations' provides a frame through which the Boards and management can view strengths and weaknesses of the federation structure, culture and processes. The practical application of the research is to help federation partners address all aspects of the federation structure, processes and culture so they are able to properly diagnose the issues and develop the right solutions.

Introduction:

Can federated nonprofit structures work? Are there distinct benefits to be gained by a federated structure? These questions are being asked by many Boards of national federated structures, particularly as they struggle with the tensions of managing diverse agendas, finding efficiencies across multiple structural layers and setting decisive and strategic directions with convoluted decision-making processes. In an article published in 2000, authors Allen Grossman and Kasturi Rangan¹ describe multi-site nonprofits as “*facing a seemingly never-ending challenge to reconcile internal issues around power, responsibility, and accountability. As a result, critical management decisions often take inordinate amounts of time, energy and resources. This reality contributes to the commonly held perception, both inside and outside the sector, that multi-site nonprofits are less efficient and effective than organizations in the for-profit sector*”. In 2004, a

¹ Managing Multi-site Nonprofits

McKinsey Quarterly article² describes the issues found in federated structures as a lack of transparency and timely flow of information; confusion about roles and responsibilities, challenges of compliance, disparity in performance, duplication of efforts and resources and the distribution of overlapping or mixed messages.

The current environment is marked by increased competition for donations and funds, more discerning and demanding donors and volunteers, and a growing demand for services and programs, which means that federated nonprofits have to work more effectively and efficiently. However, in many instances federation partners don't know where to start the search for solutions or how to frame the issues. As a result, federations may focus on the wrong problem. Considerable time and energy might be given to fixing the structure, whereas the real issue is with bad processes or culture maladies,³ such as poor communication, tension in values or perceived disparity in power. As well, many federations get bogged down in debate because they start with the development of a partnership agreement or revenue sharing model before coming to agreement about the shared vision, values, goals and roles.

Yet even though there is a need for tools and resources, there is a paucity of research and information about federated nonprofit structures. Much of the literature on governing and managing a nonprofit organization does not consider the added complexities of a federation model. Federations are by nature more complex because of the requirements of shared governance, interests, responsibilities and control.

This resource explores the unique challenges faced by federated nonprofits and identifies critical indicators of success. The research began in 2006 with funding from the Public Health Agency, Financial Assistance to National Voluntary Health Organizations and was led by Schizophrenia Society of Canada in conjunction with project partners, ALS Society of Canada and Parkinson Society Canada. The purpose was to uncover the key organizing principles and factors that contribute to a well functioning federated nonprofit. The intent was to create a practical tool that could be used by Boards and management to properly diagnose the issues so the right solutions are found.

The research included the following: 1) a literature review; 2) in-depth interviews with CEO/Executive Directors of 14 national organizations⁴; 3) a review of materials sent by 17 national federated organizations, such as bylaws, agreements, policies, roles and responsibilities and revenue sharing models; 4) consultations held across Canada with leaders from the three partnering organizations; 5) an in-depth review of the strengths and weaknesses of the three partnering organizations; and 6) an interactive workshop with leaders from nonprofit federations to share experiences and learning. Since the publication of *A Framework for Success for Nonprofit Federations* in 2007, the author has continued to revise the key indicators of success based on experience helping federation to come to agreement about the structure, processes and culture that will help it

² Non-Profits: Ensuring that bigger is better

³Governance of National Federated Organizations

⁴ See Appendix B for names of the organizations

to succeed.

Defining a Federation:

One of the first hurdles in studying federated nonprofits is to find an appropriate definition. For the purposes of this paper a federated nonprofit⁵ is defined as a *network or partnership that serves a public good and includes a national or provincial organization, affiliate branches and/or some form of local and/or regional bodies that share a mission, brand and program model and have some legal independence from one another*⁶.

One of the key features of a federation is that it is not an organization. In federated structures the autonomy of local organizations is preserved while providing a vehicle through which the partners can achieve their purpose and goals as a national movement through collective action and collaboration.⁷ The autonomous organizations that form the federation have little legal control over one another, except in the case of ownership of trademarks and name or a single charitable number. It is interesting to note that some Boards of Directors of national organizations recognize that they are a part of a federated structure but behave as if it is one organization.

Federations are highly complex and not easily defined. However, one way to define federations is to view them on a continuum ranging from centralized to decentralized structures.⁸

At one end of the continuum are those federations with close affiliations in which the national organization exercises some control over its regional, provincial or local affiliates. They may have dual reporting structures in which local Boards report to the national Board and local staff report to their own Board. At the other end of the continuum are federations that are characterized by a loose association of completely autonomous organizations.

The following diagram illustrates the continuum:



⁵ Some organizations that fall into this definition would not refer to themselves as federations. 'Federation' could be used interchangeably with societies, association or affiliations.

⁶Non-Profits: Ensuring that bigger is better

⁷ YMCA of Canada Report

⁸ Governance of National Federated Organizations

Community Living
Epilepsy

Parkinson Society
YMCA
Big Brothers Big Sisters

Girl Guides
Red Cross

Single-entity national organizations are distinct from federations because there is one Board of Directors and staff report to the national CEO/Executive Director. However, even though they are one organization, the national office must ensure that staff and volunteers from across Canada feel they can influence both the national agenda and effectively respond to local needs. Examples of organizations in this category include Muscular Dystrophy Canada, Canadian Diabetes Association, Kidney Foundation and the Arthritis Society of Canada.

There is significant variation in how federations operate, no matter where they sit on the continuum. For example, they vary in terms of the governance structure, decision-making processes, division of roles and responsibilities, and representation on and nomination process for the national Board. Definitions of membership, which can be individuals and/or organizations, vary considerably in terms of the number of members as well as their role, power and authority in governance.

As a result of this variation, there is no one model that is the best choice for federations. Each federation must consider its history, mission, culture and capacity in order to design the best possible structure and processes.

Benefits of Federated Structure:

There is a clear benefit to becoming a federation rather than remaining as separate autonomous organizations. Because a federated structure offers national scale, partners⁹ in a federation benefit from a more recognizable brand and credible reputation, a stronger voice in advocacy; economies of scale; efficiencies in administration, technology, programs, services and revenue development; and greater impact and results.

There are also benefits of being a federated structure versus a single, centralized organization. Some of those benefits include the following: 1) It creates a more equal playing field between all parts of the country. 2) It forces consensus of decisions rather than a 'head office' response. 3) It attracts local volunteer leadership who are more engaged and therefore more motivated to provide time, resources and connections. 4) It creates higher visibility in a region or community. 5) It is more nimble and responsive to specific local needs and context in the design and delivery of programs and services. 6) And it increases accountability because each organization is legally responsible for its actions.

However, it is important to note that these benefits are more likely to be achieved if the federation is achieving the critical success indicators described in this paper. Also,

⁹ Partners refers to all those who participate in the federation, including the national organization. It cannot be used interchangeably with members or affiliates because they do not include the national organization.

it should be noted that single, centralized national organizations can achieve, to some degree, these same benefits if they have the right processes, culture and structure in place to achieve them. The goal of any federation should be to get the benefits of a centralized structure, such as greater efficiency and effectiveness, while retaining the benefits of local autonomy, such as community responsiveness.

Unique Challenges:

There are many challenges to managing a national organization regardless of whether it is a single, centralized structure or within a federated structure. However, federations present two unique challenges.

Role Definition and the Value Proposition

Many federations struggle with duplication of activities and a confusion of roles. This creates tension because of a sense that one level is duplicating the effort of another, or efforts ‘fall between the cracks’ because it isn’t clear who is accountable for what activities. This can be particularly the case if the federation has a provincial level that mirrors the national role or has too many small local organizations. Often discussions focus on protecting turf rather than determining what is sustainable and best meets the need of those who are served by the federation.

The tension is exacerbated when the respective roles and responsibilities in revenue development are competing. A revenue allocation model that calls for the national organization to support itself through donations from individuals will generate competition because both the national and local organizations are “trolling for funds in the same waters”.

While there may be a clear understanding that direct service is delivered locally, the role of the national office is often not clear or is misunderstood and undervalued. In some cases, the national office role is unclear because there is tension between its role serving those who are at the heart of the federation mission and its role serving the federation partners. The question needs to be resolved clearly about who the national office serves and in what capacity. Some national offices, such as Big Brothers Big Sisters and United Way Canada, have clearly articulated that they exist to support the work of the affiliates as well as protect the brand and fulfill aspects of the mission, such as national advocacy.

The misunderstandings and undervaluing of the national offices can occur because the national office has inadequately articulated, measured and reported on its outcomes in a way that is seen as a ‘value added’ and to which it is prepared to be held accountable by the local organizations. At the same time, local organizations may not see the value of nation-wide activities or take advantage of the benefits that are derived from a national scale. This is further compounded in the case in which local organizations contribute funds to the national office and the value of these ‘fees’ are not seen as commensurate with the value received.

Power and Decision-making

Power in federated structures is based on persuasion, not authority. The national Board of Directors and management have limited power to make local autonomous organizations in the federation conform to decisions. One of the few ways in which it can use its power to enforce decisions and actions is to take away the use of the name, logo and trademarks or the ability to operate under the charitable number. Beyond this, the federation ‘power tools’ are peer pressure, membership bylaws and nation-wide policies that are adopted by each federation partner.

A clear distinction needs to be made between the role of the national Board of Directors as it relates to the national office and its role in the federation. Some national Board of Directors act as if they have a greater ability to set direction and impose behaviors than is the case. As a result, they undervalue the essential role of the national organization within the federation as convener and facilitator. The high turnover of CEO/Executive Directors in national organizations within a federated structure¹⁰ is symptomatic of this confusion about its role and ability to influence. A typical scenario is that the national organization Board of Directors hires a new CEO with strong skills in ‘getting things done’ and with the expectation that they will set national strategic directions and generate more impact. Once in the position, the new CEO or Executive Director finds that he or she must work through a time-consuming process of consensus building.

Even the language used by federations can be illustrative of the confusion about the role of the national organization. The national organization is a partner in the federation, but written and verbal communication often describes the national organization as the federation. This can lead to a sense of inequity and create a ‘them and us’ dynamic.

Power issues also emerge with conflicting agendas in cases in which both the national and local organization feel they are in a legitimate position to make decisions. A case in point is decisions about the quality and type of services to be provided by the local organization. The local organization feels it is closer to the client and therefore is in the best position to decide what should be offered. At the same time, the national organization is concerned with maintaining quality standards and program consistency in order to strengthen the brand experience and to mitigate risks. This may cause local organizations to feel that the national organization is interfering with their operations.¹¹

Because federations must use persuasion, not authority, to make decisions the process can be fraught with paralysis and micromanagement. To work, federations must be led by volunteers and managers skilled in and committed to consensus building. There is a high cost of engagement, which if done properly can lead to better decisions but, if not, can lead to ‘watered down’ compromises.

A degree of conflict and debate is inevitable - even healthy - in federations. However,

¹⁰ This observation is based on the authors experience in the nonprofit sector over 25 years. Further research is required to explore this in a more systematic way.

¹¹ Managing Multi-site Nonprofits

considerable resources can be wasted defining and redefining the relationship and arriving at decisions because nothing is documented and there are no formal processes. As a result, personality becomes a powerful force. As well, the lack of clarity means that it is difficult to hold partners accountable for delivering on promises.

How to Use the Resource:

A Framework for Success for Non-Profit Federations is designed to help Board and staff members to build and maintain a strong and healthy federation. It describes the key organizing principles and factors that contribute to its success, as well as provides an opportunity for leaders to reflect on their own federation and acknowledge strengths and make improvements. This resource provides a framework through which federation partners can view and organize issues and solutions.

The resource does not prescribe a federation structure or model because there is no ‘one size fits all’ formula for building and maintaining a successful federation. It does provide a set of organizing principles and success factors that can guide decisions about the structure, governance, management and operations of a federation as well as the culture, policies and practices that drive it.

A Framework for Success for Non-Profit Federations is written for all federation partners, including the Board and staff of the national organization, the Board and staff of provincial /regional/divisions as well as chapters, outreach and support groups. It describes the principles and success factors that bind the federation and relate equally to all the partners.

By using the framework as a guide for reflection, partners in the federation can:

- stimulate a meaningful and focused dialogue about the key ingredients that need to be in place to derive the full benefits of being a part of a federation
- elevate the discussion about the federation beyond the day to day issues
- identify what is currently working well and what needs to be strengthened
- generate a realistic action plan
- create an environment for open and honest conversation
- manage the tensions that emerge, which may manifest in a ‘them and us’ attitude between the national and provincial organizations

It can be used as a framework for decision-making when creating or reviewing the federation:

- ✓ governance structure

- ✓ agreement of understanding or partnership agreement
- ✓ communications and relationships
- ✓ strategic plan
- ✓ roles and responsibilities
- ✓ revenue generation and sharing formula
- ✓ accountability

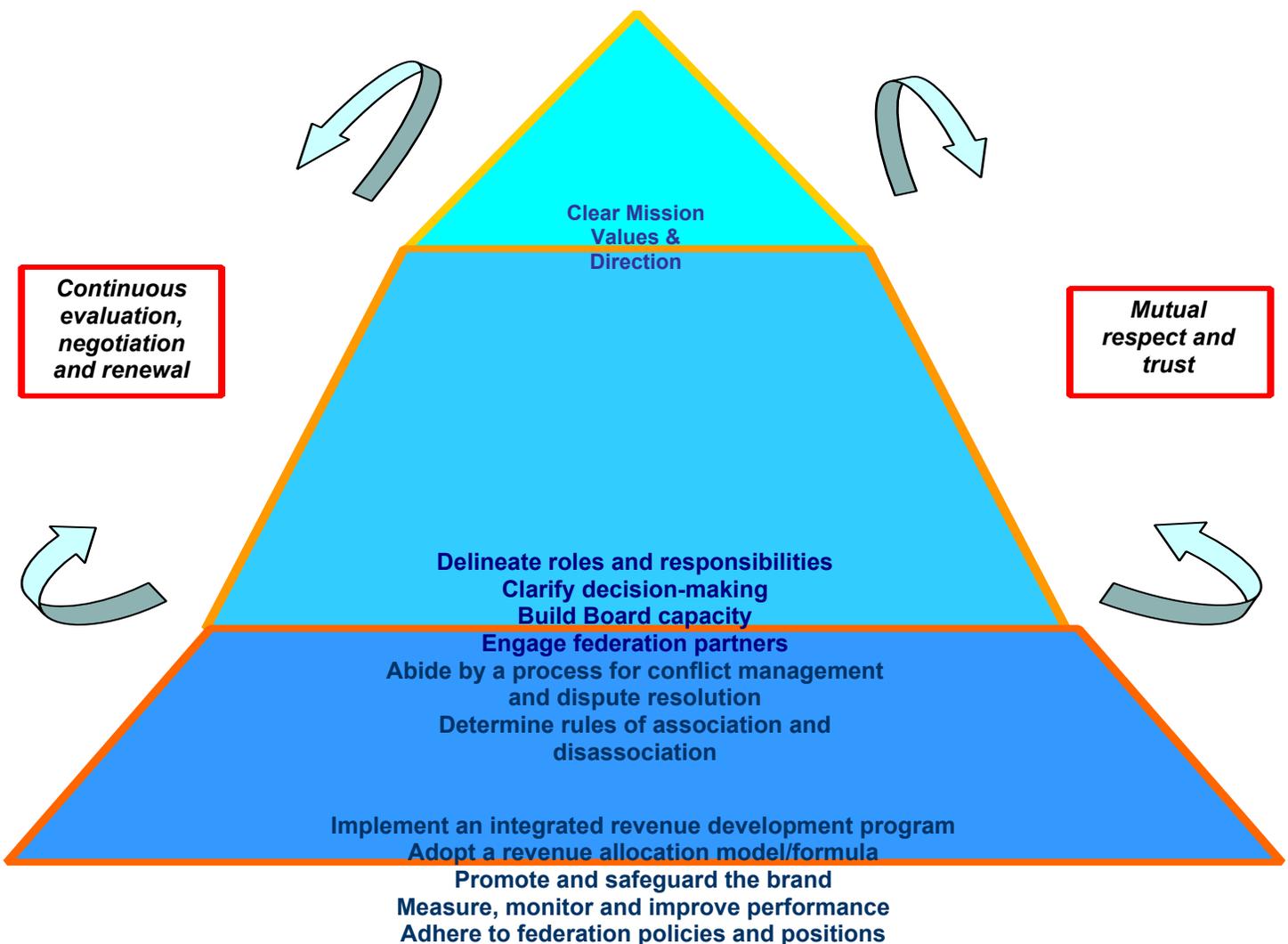
The Critical Success Factors:

While there is no 'one size fits all' model, this diagram describes the critical success

factors that must be present in order to be a strong and healthy federation. They are interdependent; one is not more important than another. However, they cascade down and build on one another – from a shared mission, values and direction to clearer definitions of relationships and processes and then to activities that strengthen all federation partners.

It is important to note that many of the success factors focus on creating shared purpose, generating clarity and building processes. However, unless federation partners are prepared to hold each other accountable for abiding by the structures, processes and culture, then the federation will not achieve the trust and mutual respect which is at the heart of a successful federation. As well, it needs to be recognized that maintaining a federation is a continuous process of evaluation, negotiation and renewal.

The following success factors should be in place:



Highlights of the Success Factors:

Share a passion for the mission

Key factors:

- ✓ *The federation mission gives a compelling reason why all federation partners are working together.*
- ✓ *All the individual organizational mission statements are aligned with the federation mission.*

Live by shared values

Key factors:

- ✓ *The values inform the way that federation partners work together.*
- ✓ *Federation partners hold each other accountable for living the values.*

Forge a common direction based on shared priorities

Key factors:

- ✓ *There is both a federation and national office strategic plan. The vision and strategic directions inspire and energize federation partners.*
- ✓
- ✓ *All federation partner strategic and annual plans are aligned with the federation strategic plan.*
- ✓ *There are mechanisms in place to monitor and celebrate the progress made in achieving the federation strategic priorities.*

Delineate roles and responsibilities based on reasonable expectations

Key factors:

- ✓ *The roles and responsibilities of each of the parts of the federation (the national Board, the national office, the collective work of the provisional/regional/local organizations) are clearly articulated; each is seen as value-added, sets out reasonable expectations and does not duplicate the efforts of another part of the federation.*
- ✓ *The national Board has delineated its role in governance of the national office as distinct from its leadership role in the federation.*

Clarify decision-making

Key factors:

- ✓ *There is a clear understanding that leadership is shared across the federation and there is acknowledgement of the role of consensus, not authority, as key to decision-making. The CEO/Executive Director of the national organization has strong skills in communication and facilitation and puts high value on process as well as on delivering results.*
- ✓ ***Decision-making processes have been put in place, such as a Executive Leadership Council, to oversee the operations of the federation as well as opportunities for Board chairs from the provincial/regional/local organizations and the national Board to debate and resolve federation issues and plans.***
- ✓ *Processes make the distinction between decisions that need unanimous or consensus agreement because they are critical (e.g. those tied to risk management) versus those that need a majority (e.g. those related to activities).*
- ✓ *Decision-making is based on accurate, thorough and timely information.*
- ✓ *There are mechanisms in place to hold all federation partners accountable for decisions that are made.*

Ensure the national Board has the willingness and capacity to fulfil its role in the federation

Key factors:

- ✓ *The national Board nomination process ensures that it has the right mix of skills, expertise and knowledge to think strategically and make good nation-wide decisions.*
- ✓ *If Board members represent a federation partner organization, he/she has the clear authority to make and stand by decisions. These Board members handle the conflict of allegiance between local and national interests well.*
- ✓ *The governance model and committee structure enhances the national Board's ability to be effective and to properly engage stakeholders.*

Undertake ongoing engagement

Key factors:

- ✓ *Information is shared across the federation in a way that is transparent, timely, accurate and helpful.*
- ✓ *Consultation processes are properly designed to ensure that participants can provide meaningful input and reach consensus. Federation partners are also held accountable for participating in a productive way.*
- ✓ *Technology is effectively utilized to achieve better communication.*

Abide by a process for conflict management and dispute resolution

Key factors:

- ✓ *There is a clearly articulated, agreed to and constructive process to manage conflict and resolve disputes within the federation. The process is consistently applied, formal and fair.*

Establish and enforce clear mechanisms and rules for association and termination/disassociation

Key factors:

- ✓ *All partners understand the obligations of association in the federation. There are clear consequences for not meeting those obligations, which are upheld consistently.*
- ✓ *A process has been established for disassociation which is fair, transparent and efficient.*

Implement an integrated federation revenue development program

Key factor:

- ✓ *There is a federation wide revenue development program that is driven by best practices, efficiencies of scale, collaboration and a donor-centred approach so that partners are not working at cross purposes.*
- ✓ *There is an agreed to nation-wide case for support.*
- ✓ *The delineation of revenue development roles and responsibilities are based on which federation partner is in the best position to do the work most effectively, not on who keeps the revenue.*

Adopt a fair and sustainable revenue sharing or allocation model and formula

Key factors:

- ✓ *The national office has clearly demonstrated to federation partners that they are providing tangible and meaningful value.*
- ✓ *The revenue sharing model and formula promotes collaboration in revenue development, a fair and equitable distribution of funds, transparency and sustainability while also meeting reporting and regulatory requirements. It is also based on realistic expectations.*
- ✓ *There are mechanisms in place to hold federation partners accountable for meeting revenue sharing obligations.*

Promote and safeguard the federation brand

Key factors:

- ✓ *The name and trademarks are protected and there is a clear understanding by all federation partners about ownership and usage.*
- ✓ *The brand attributes are clearly articulated and are safeguarded through federation-wide policies, processes and standards.*

Develop a system for measuring, monitoring and improving the federation

Key factors:

- ✓ *There are mechanisms to collect and analyze information about federation-wide performance. The performance information is tied to the federation strategic plan.*
- ✓ *There are clear and reasonable expectations about standards of practice that are designed to strengthen the performance of all partners in the federation. Federation partners are held accountable for fulfilling the standards.*

Adhere to federation policies and positions

Key factors:

- ✓ *Federation wide policies and positions have been adopted by all federation partners and are seen as useful, practical and easy to access.*

Detailed Description of the Indicators of Success:

Share a passion for the mission

In a strong and healthy federation, partners¹² are clear about their shared mission. It is reviewed, and if necessary, revised as well used as a backdrop to make decisions and set priorities. The shared mission reflects the collective contribution of all the federation partners. It does not preclude each partner having a different mission statement if it is consistent with and supports the shared mission of the federation. It needs to be at the centre of any federation decisions and processes.

Key factors:

- ✓ *The federation mission gives a compelling reason why all federation partners are working together.*
- ✓ *All the individual organizational mission statements are aligned with the federation mission.*

Live by shared values

Federation partners must articulate clear and meaningful values or guiding principles that drive their behavior. Along with the mission, the partners become the unifying force which keeps participants grounded. For example, federation values might read this way: *ensure that the people served come first; value the different capacities and interests of all federation partners; consistently aim for efficiency and effectiveness; and communicate in an open and transparent fashion.* Not only are these values agreed to and kept highly visible, they demonstratively translate into the governance, management and operations of the federation. As well, all partners are held accountable by each other for living the values. Each partnering organization may have its own set of values that are complementary.

Key factors:

- ✓ *The values inform the way that federation partners work together.*
- ✓ *Federation partners hold each other accountable for living the values.*

Forge a common direction based on shared priorities

Strong and healthy federations have articulated an ideal future that can only be achieved by the partners working together. The vision and strategic directions inspire and energize federation partners. They must be specific enough to be easily interpreted and used as a

¹² Partners refer to all the participants in the federation, including the Board and staff of the national organization, provincial/division/regional and local organizations/chapters/affiliates/support groups.

navigational tool while being flexible enough to allow partners to effectively respond to their own context. A successful federation then articulates measurable and manageable goals and priorities that will help it to achieve its vision. For example, a federation goal might be to increase revenues for research by 10% or build value-added partnerships that enhance support services. While the goals are shared by all federation partners, each partner makes a different contribution to them depending upon its role and resources. As well, federation partners agree to a reasonable number of shared priorities that can be met within the specified timeframes. Given that the goals and priorities are set against realistic expectations, all the partners can demonstrate the capacity to deliver on them. Having participated in the development of the vision and goals, partners are prepared to take ownership for achieving them and have built them into their own strategic or annual plans.

Key factors:

- ✓ *There is both a federation and national office strategic plan. The vision and strategic directions inspire and energize federation partners.*
- ✓
- ✓ *All federation partner strategic and annual plans are aligned with the federation strategic plan.*

- ✓ *There are mechanisms in place to monitor and celebrate the progress made in achieving the federation strategic priorities.*

Delineate clear roles and responsibilities based on reasonable expectations

A strong and healthy federation has assigned explicit roles and responsibilities for each of the federation partners, including the national Board, national office, provincial/divisional/regional Boards and staff, and local organizations/chapters/support or outreach groups. They are comprehensive and touch on governance, management, program delivery and fundraising and clearly lay out who has what authority to do what and who must be consulted. The division of roles and responsibilities reflect the federation values and they are based on what each part of the federation can do most effectively. There is a clear value-added and no duplication of efforts. As well, the roles and responsibilities are based on realistic expectations because they take into consideration the various capacities of partners. Therefore, the description of roles and responsibilities might delineate between different provinces or regions based upon capacity. Once the roles and responsibilities are established, a successful federation ensures that each partner is fulfilling its part. There are the resources available or a plan to build the resources so that each partner can meet the expectations, and there is a clear and constructive process to monitor and enforce compliance. When considering roles and responsibilities, successful federations recognize the expertise, experiences and gifts from all parts of the federation. For example, a pilot project might be assigned to the partner that is best positioned to accomplish it, regardless of whether the funds were generated nationally.

Key factors:

- ✓ *The roles and responsibilities of each of the parts of the federation (the national Board, the national office, the collective work of the provisional/regional/local organizations) are clearly articulated; each is seen as value-added, sets out reasonable expectations and does not duplicate the efforts of another part of the federation.*
- ✓ *The national Board has delineated its role in governance of the national office as distinct from its leadership role in the federation.*

Clarify decision-making

Leadership is shared within strong and healthy federations. Not only is the concept of shared leadership reflected in the values, it is also embedded within the culture of the federation. The national Board recognizes that it has a dual role to govern the national office as well as to provide leadership to the federation. It is critical that the leadership style of the chair of the national Board and the CEO or Executive Director of the national office demonstrate strong facilitation skills and cultivate inclusion, openness and consensus building without becoming paralyzed by process. Other decision-making bodies and processes are put in place to ensure that power is shared across the federation. For example, national health federations such as the Alzheimer Society, Parkinson Society and Cancer Society, have established a decision-making body comprised of the Executive Directors from divisions/regions/provinces across Canada which focuses on federation management and operational issues. Successful federations also provide opportunities for the national Board, Chairs of divisions /regions/provinces and staff across the federation to come together, for example in a planning assembly, to address strategic decisions and approve positions and policies.

As well, partners clearly delineate between the types of decision-making required. For example, in the case of decisions that will have a significant impact on federation partners, it is understood that it requires unanimous or consensus agreement, whereas in other cases, a majority decision is appropriate. Critical decisions are also based on reliable information, such as facts and evidence, so they are informed and unbiased.

Key factors:

- ✓ *There is a clear understanding that leadership is shared across the federation and there is acknowledgement of the role of consensus, not authority, as key to decision-making. The CEO/Executive Director of the national organization has strong skills in communication and facilitation and puts high value on process as well as on delivering results.*
- ✓ *Decision-making processes have been put in place, such as a Executive Leadership Council, to oversee the operations of the federation as well as opportunities for Board chairs from the provincial/regional/local organizations and the national Board to debate and resolve federation issues*

and plans.

- ✓ *Processes make the distinction between decisions that need unanimous or consensus agreement because they are critical (e.g. those tied to risk management) versus those that need a majority (e.g. those related to activities).*
- ✓ *Decision-making is based on accurate, thorough and timely information.*
- ✓ *There are mechanisms in place to hold all federation partners accountable for decisions that are made.*

Ensure the national Board has the willingness and capacity to fulfil its role in the federation

In a strong and healthy federation, the national Board has the capacity to provide good leadership to not only properly govern the national office but also to ensure the federation is successful. It is comprised of the right mix of skills and expertise and the national Board nomination process, training and orientation and the formal performance review help to ensure that Board members are able to contribute effectively to both roles. As well, the right structure has been created to provide good governance and leadership. For example, the Board is the right size and uses the right governance model and the committee structure helps the Board to be more effective and to properly engage stakeholders. If the membership goes beyond Board members and has a role in governance, those members have the capacity to make good decisions. Finally, the Board members make decisions based on the best interests of the national office and the federation. They are equipped to handle issues of conflict of allegiance between local and national interests and are therefore prepared to speak with a common voice once decisions are made.

Key factors:

- ✓ *The national Board nomination process ensures that it has the right mix of skills, expertise and knowledge to think strategically and make good nation-wide decisions.*
- ✓ *If Board members represent a federation partner organization, he/she has the clear authority to make and stand by decisions. These Board members handle the conflict of allegiance between local and national interests well.*
- ✓ *The governance model and committee structure enhances the national Board's ability to be effective and to properly engage stakeholders.*

Undertake an ongoing process of engagement with the federation partners

An ongoing process of engagement of Board and staff members of federation partners is a cornerstone of a successful federation. It means that partners are receiving meaningful information so that the right information is getting to the right people at the right time. Technology is effectively utilized to achieve better communication. There is also a process in place to regularly and rigorously assess the effectiveness of the communication to ensure it continues to be meaningful. As well, a federation that properly engages its partners provides mechanisms for regular dialogue and feedback. There is a commitment to consultative processes which include formal and informal opportunities to have real dialogue in a productive and constructive environment. However, the right balance is also found between the need to consult and the need to get the job done. As well, there are many formal and informal opportunities for all partners to share lessons learned and best practices.

Key factors:

- ✓ *Information is shared across the federation in a way that is transparent, timely, accurate and helpful.*
- ✓ *Consultation processes are properly designed to ensure that participants can provide meaningful input and reach consensus. Federation partners are also held accountable for participating in a productive way.*
- ✓ *Technology is effectively utilized to achieve better communication.*

Abide by well understood and agreed to process for conflict management and dispute resolution

A strong and healthy federation has developed a clear and effective process for conflict management and dispute resolution. As well, there is a formal mechanism in place to manage conflict and resolve disputes. The mechanism provides a range of procedures to address different severities of conflicts and disputes and is seen by partners as constructive. The process is consistently and rigorously applied to all partners and mirrors the federation values.

Key factors:

- ✓ *There is a clearly articulated, agreed to and constructive process to manage conflict and resolve disputes within the federation. The process is consistently applied, formal and fair.*

Establish and enforce clear mechanisms and rules for association and termination/disassociation

A strong and healthy federation has clearly articulated and agreed to the obligations of association. The obligations may relate to such areas as financial disclosure, revenue sharing, use of name and attendance at conferences. As well, there are clearly stated and well understood consequences and processes for both voluntary and involuntary disassociation/termination. The reasons or conditions for disassociation/ termination are formally adopted and are not based on a situation-by-situation response. There is also a transparent and fair process for disassociation/termination that clearly delineates roles and responsibilities and that is able to respond quickly to urgent situations.

Key factors:

- ✓ *All partners understand the obligations of association in the federation. There are clear consequences for not meeting those obligations, which are upheld consistently.*
- ✓ *A process has been established for disassociation which is fair, transparent and efficient.*

Implement an integrated federation revenue development plan

Successful federations have a well articulated revenue development plan that integrates the efforts of all the partners and is driven by a donor-centre approach. It is based on the shared mission, vision, direction and values and framed against roles and responsibilities. It can also be driven by agreed to guiding principles, such as the plan will: *build from successes; be based on clear terminology; streamline resources to create efficiencies of scale; and focus on sustainability.* It clearly articulates what is meant by revenue and identifies specific sources. All partners understand how it works and the implications for their own organization. It takes into consideration the need for capacity building and logically integrates revenue development across Canada so that there is maximum effectiveness and efficiency and minimal duplication. The plan also allows partners to abide by all legislative and legal restrictions and best practices (e.g. *IMAGINE Canada Ethical Fundraising and Financial Accountability Code*).

Key factor:

- ✓ *There is a federation wide revenue development program that is driven by best practices, efficiencies of scale, collaboration and a donor-centred approach so that partners are not working at cross purposes.*
- ✓ *There is an agreed to nation-wide case for support.*

- ✓ *The delineation of revenue development roles and responsibilities are based on which federation partner is in the best position to do the work most effectively, not on who keeps the revenue.*

Adopt a fair and sustainable revenue sharing or allocation model and formula

A revenue model and formula clearly delineates how federation partners share revenue in successful federations. This should include how the national office is financed and may also include how those regions/divisions/provinces/local organizations with more potential to generate revenue support those with less. Successful revenue sharing models are separate from the description of revenue development roles and responsibilities. Partners first determine who is in the best position to generate the most amount of money the most successfully and then decide how it is shared. For example, it makes sense for the national office to manage a nation-wide direct mail program, but should not be assumed that it should then keep that revenue. The revenue sharing formula is also based on each partner, particularly the national organization, demonstrating its value within the federation and is tied to realistic revenue expectations. The partners arrive at a revenue formula after careful consideration about ways to reduce competition for donors, what is fair and equitable and the reporting and regulation requirements.

As well, there are mechanisms in place to ensure that all partners are held accountable for adhering to the financial obligations. It includes a range of consequences if a partner does not meet the obligations, while recognizing that there may be special circumstances.

Key factors:

- ✓ *The national office has clearly demonstrated to federation partners that they are providing tangible and meaningful value.*
- ✓ *The revenue sharing model and formula promotes collaboration in revenue development, a fair and equitable distribution of funds, transparency and sustainability while also meeting reporting and regulatory requirements. It is also based on realistic expectations.*
- ✓ *There are mechanisms in place to hold federation partners accountable for meeting revenue sharing obligations.*

Promote and safeguard the federation brand

(Brand is more than the name and logo of the organization. It refers to how the federation is viewed in the minds of stakeholders. It includes the 'personality' and reputation of the federation which are driven by such things as values, accountability and performance.)*

A successful federation has established and promotes a clear and uniform brand. Partners have considered the attributes of the brand, such as holding high ethical standards and delivering quality service, and take pride in them. They regularly monitor the views of

stakeholders about the brand attributes. As well, there are mechanisms in place to protect the brand. Not only do all partners appreciate the risks of jeopardizing the brand, the federation effectively anticipates, assesses and manages the governance, operations, program and reputational risks. In the case of unanticipated situations, there is a well conceived and understood damage-control process.

Key factors:

- ✓ *The name and trademarks are protected and there is a clear understanding by all federation partners about ownership and usage.*
- ✓ *The brand attributes are clearly articulated and are safeguarded through federation-wide policies, processes and standards.*

Develop a fair, supportive and reliable system for measuring, monitoring and improving the federation

A successful federation has collected and analyzed key performance indicators and set clear outcome-based standards of practice that apply to all federation partners. The performance information is collected in a way that is consistent across the federation. Standards of practice, for example, set criteria for strategic planning, board composition, evaluation, service delivery and fiscal and human resource management. The standards distinguish between minimum expectations and excellence and take into consideration the different capacities of partners. There is also a clear and reasonable mechanism to review, and if necessary, revise them. Partners would say that the process for measuring and monitoring performance and achievement of the standards of practice is reasonable, constructive and fair and that it generates reliable information in a form that allows for concrete responses. As well, partners are encouraged and supported to improve their ability to meet and exceed the standards. There are incentives, such as celebration of successes, and clear mechanisms to help improve performance, such as coaching, mentoring, sharing of best practices and resources, templates and training.

Key factors:

- ✓ *There are mechanisms to collect and analyze information about federation-wide performance. The performance information is tied to the federation strategic plan.*
- ✓ *There are clear and reasonable expectations about standards of practice that are designed to strengthen the performance of all partners in the federation. Federation partners are held accountable for fulfilling the standards.*

Adhere to consistent, useful and accessible policies and positions

Policies and positions are used within successful federations to align practices and provide consistency. They are well articulated and understood and are seen to help

strengthen the federation. For example, federation policies and positions might address areas such as statutory holidays, travel, insurance, program introduction, collection and receipting of funds, drug promotion, treatment and access to medication. All partners would describe the policies and positions as useful, practical and easy to access because all those who are affected by them, have been consulted. They are also compatible with policies and positions within the partner organizations. As well, there is a clear and effective mechanism to ensure policies and positions are consistently applied to all partners.

Key factors:

- ✓ *Federation wide policies and positions have been adopted by all federation partners and are seen as useful, practical and easy to access.*

APPENDIX A: Organizing Principles

The following is a set of organizing principles which emerged through the literature review and interviews with federation leaders. They are designed to stimulate reflection and dialogue with federation partners. They can be used as a backdrop to discussions when developing or making changes to the federation values, agreements, policies or procedures and should be reflected in the way that the federation is structured, managed and builds relationships. The organizing principles are:

Engage people:

- Excite federation partners with the potential to be stronger and healthier together; ensure that they feel a part of a movement, not just a structure
- Take the time, allocate the resources and have the patience to properly engage all federation partners

Build relationships:

- Begin all dialogues with a presumption of good will
- Understand that being credible by delivering on promises is a key to building trust
- Acknowledge local needs while addressing national aspirations
- Respect and value the richness of different perspectives and appreciate the varied developmental stages of the federation partners
- Create effective and meaningful partnerships between volunteers and staff
- Help people to manage the tension between self interest and cooperation
- Acknowledge the role of persuasion, not authority, as key to decision-making

Manage processes:

- Recognize that maintaining a federation is a continuous process of evaluation, negotiation and renewal
- Find the equilibrium between formal processes and flexibility and between efficiency and inclusion
- Be prepared to think about ‘what we can live with’, not always in absolutes
- Ensure the capacity is or will be in place to deliver on expectations
- Expect mutual accountability
- Ensure the advantages of working together offset the real or perceived costs

APPENDIX B: Best Practices Checklists and Samples

Share a passion for the mission

Use the following discussion outline to review and if necessary develop your federation mission statement. This can be used with key federation partners in a facilitated discussion or as a questionnaire.

Review and/or Development of the of the Federation Mission: Discussion Outline

- € Does our federation mission statement accurately embrace all of the activities of all of our partners?
- € Could our national organization, provincial, regional and local partners' mission statements easily align with the federation mission?
- € Do our partners feel that they could rally around the federation mission? What would need to change in the statement to make it more compelling?
- € Is the language clear and understandable to staff, volunteers, those served and other key stakeholders?
- € Is it unique? Does it set us apart from other federations in the sector?

Sample Mission Statements:

We commit to Canada's young people that we will be leaders in providing them with the highest quality, volunteer based mentoring programs. Big Brothers Big Sisters

We are a national, community based organization of volunteers, whose mission is the eradication of cancer and the enhancement of the quality of life of people living with cancer. Canadian Cancer Society

Canadian Mental Health Association is a nation-wide, voluntary organization, promotes the mental health of all and supports the resilience and recovery of people experiencing mental illness. It accomplishes this through advocacy, education, research and service.

Our mission is to ease the burden and find a cure through research, education, advocacy and support services. Parkinson Society:

We build strong kids, strong families, strong communities. The YMCA in Canada is dedicated to the growth of all persons in spirit, mind and body, and in a sense of responsibility to each other and the global community. YMCA

Live by shared values (may be called guiding principles or aspirations)

Sample Value Statements:

- *We will make the people we serve the primary focus in all decisions. (Alzheimer Society)*
- *We expect mutual accountability between all federation partners, including follow through on what is agreed to; measure and report outcomes and use dollars*

wisely. (Alzheimer Society)

- *We will value the differences and treat each other with consideration and dignity and understand and appreciate the regional differences in priorities, capacities and challenges (Alzheimer Society)*
- *We will insist on open and frequent dialogue and sharing of appropriate information and ensure that decision-making processes are clearly understood (Alzheimer Society)*
- *We are honest and ethical in all that we do, and engage in responsible decision-making that reflects the highest standards of conduct. This ensures that our credibility, leadership and use of donor dollars is never in question. (Canadian Cancer Society)*
- *We value our history of learning as we strive for continuous improvement and development in all levels of the organization. We embrace a creative approach to finding solutions that are appropriate and consistent with the strategy, character and abilities of the organization. We value diversity and work hard to create a collaborative environment where we benefit from the cultural perspectives of others. (Canadian Cancer Society)*
- *Our value is to respect community wisdom and encourage citizen involvement (United Way)*
- *Our value is to endorse innovation, partnerships and collective action. (United Way)*
- *In order to achieve social and other forms of justice, we must embrace difference and diversity among peoples. (YWCA)*

Forge a common direction based on shared priorities

Sample Vision Statements:

Every child in Canada who needs a mentor, has a mentor. (Big Brothers Big Sisters)

Creating a world where no Canadian fears cancer. (Canadian Cancer Society)

Mentally healthy people in a healthy society. (Canadian Mental Health Association)

Together we are building stronger kids, families and communities; we are making communities better places for everyone to live; we have more people joining with us as

participants, members, volunteers, staff, donors and partners; we are a thriving and vibrant network that exchanges ideas, information and expertise in faster and better ways; we help and support each other more than ever; we are a leading Canadian charity. (YMCA)

Checklist of Good Practice:

- € The federation strategic plan touches on all aspects of what all partners in the federation want to accomplish; it is not specific to the national organization.
- € The development of the plan was facilitated in a way that all the partners in the federation had an equal voice in identifying issues and determining critical strategic directions.
- € There were many diverse perspectives and opinions voiced about the direction of the federation. People were encouraged to challenge assumptions and the status quo. The strategic planning process was undertaken in a very creative environment.
- € Our federation strategic directions and priorities are not 'business as usual'. It calls for exciting and different directions.
- € Our strategic planning process started with a bold vision of what all the partners could achieve by working together.
- € The federation strategic directions are broad enough that all partners can integrate them into their own strategic directions, but they are specific enough that we can measure our progress in achieving them.
- € We have clear indicators that demonstrate what the strategic direction looks like if it is achieved.
- € We have a formal process to measure our progress in achieving our strategic directions and for holding each other accountable for delivering on expectations.

Some examples of well articulated federation strategic directions:

- *We will review our respective organizations to ensure internal processes are as effective as possible, utilizing performance management tools where appropriate.*
- *We will harness innovation through pilot projects and initiatives which allow us to test new models and more effectively serve people.*
- *We will ensure our allocation of resources has recognizable and meaningful impacts.*

- *We will inspire and energize our volunteers and staff to achieve higher performance standards.*
- *We will work collaboratively with other organizations to strengthen our capacity to deliver quality services.*
- *We will communicate our achievements in research more effectively so that more people are compelled to provide support.*
- *We will diversify our resource base so that we are able to sustain high quality programs that have impact on more people.*

Delineate clear roles and responsibilities based on reasonable expectations

Checklist of Good Practice:

- € The delineation of roles and responsibilities clearly allows the federation to be more effective and efficient and to better achieve the federation mission.
- € The federation values are reflected in the division of roles and responsibilities (e.g. we will build collaborative relationships).
- € Representatives from all the partners in the federation participated in the development of the roles and responsibilities so that there is ‘buy-in’ across the federation.
- € There is clear alignment between all parts of the federation.
- € The roles and responsibilities are comprehensive so activities won’t ‘fall between the cracks’.
- € There is no duplication in roles and responsibilities.
- € The roles and responsibilities relate to the full spectrum from programs through to governance, communication and organizational development.
- € Each description of a role and responsibility begins with a verb that is clearly understood by everyone (e.g. we avoid words like ‘lead’ because everyone can interpret it differently).
- € The other words used in the description of roles and responsibilities are clearly understood (e.g. if ‘best practices’ are used, then there is a clear understanding about how best practices are defined).

- € There is a clear distinction between the responsibilities. For example the national Board might be responsible for facilitating the development of a strategic plan and/or designing and monitoring the process whereas the provincial/division or local organizations are responsible for monitoring and implementing the plan.
- € The roles and responsibilities are aligned with capacity or there is a plan in place to address capacity gaps.

Clarify Decision-making:

Checklist of Good Practice:

- € The leadership for the federation is seen as a joint responsibility of both the national Board and office as well as the provincial/regional/local organizations.
- € The concept of shared leadership is captured in the federation values
- € The Chair of the national Board and Executive Director/CEO of the national office demonstrate strong facilitation skills and cultivate inclusion, openness and consensus building.
- € There are many formal and informal opportunities for all partners to share lessons learned, best practices and program models.
- € We actively draw from the talents and expertise of all partners. Pilot projects assigned to the partner that is best positioned to accomplish it.

Undertake an ongoing process of engagement with the federation partners

Checklist of Good Practice:

- € The information we provide keeps partners informed of current and critical issues in the environment and within our federation.
- € The information is sent in a timely fashion so that staff and volunteers have time to process it and take appropriate action.
- € We provide information to potential and existing donors, funders and volunteers that makes a strong case for support of our mission.
- € The information we provide is digestible because it highlights key information that is considered highly relevant.
- € We share our successes, experiences and lessons with each other in a timely and effective way.

- € When we engage in consultation we offer ample opportunity to provide meaningful feedback and allow the appropriate amount of time and the proper process to reach consensus.
- € We distinguish between significant and less important decisions and offer appropriate processes for each kind of decision.
- € (If appropriate) Our information is translated into French in a way that is timely and accurate.
- € The leadership within the federation meet face-to-face at least once a year.

Abide by well understood and agreed to processes for conflict management and dispute resolution

Contact Linda Mollenhauer for more information about a process for conflict management and dispute resolution.

Enforce clear mechanisms for association and termination/disassociation

Checklist of Good Practice:

- € We have clearly articulated the reasons that a member/affiliate may be disassociated from the federation, such as:
 - a threat to the wellbeing of the federation
 - not meeting the obligations of partnership in the federation
 - bankruptcy or dissolution

- € We have clearly established the consequences of disassociation, such as:
 - Cease use of registered trademark and trade names
 - Communicate, with proof, that all members, funders, donors and the general public understand that there is no longer any association with the national/provincial organization
 - Confirmation that all signage associated with the name and logo has been removed
 - Return of donor list developed under the auspices of the federation
 - Return of materials, technology and literature belonging to the federation
 - No longer share in the benefits of the federation (e.g. attendance at conferences, AGM)
 - A mechanism might be established to carry forward the mission of the federation in that area

- € We have an agreed to mechanism for resolving issues so that disassociation can be avoided if possible. This process is constructive, transparent and clear and allows for corrective action to take place. (see Conflict Management and Dispute Resolution Process)
- € Processes are described for both voluntary and involuntary disassociation.
- € The processes include clear timelines and describe who is to communicate and how it will be done.
- € There is a clear appeal process in place that is fair, transparent and specific.
- € In the case of involuntary disassociation, it is clear who will make the final decision.
- € If there are any costs associated with the process of disassociation, it is clearly stated who is responsible for them.
- € The case of bankruptcy and dissolution is specifically addressed.

Adopt a fair and sustainable revenue sharing or allocation model and formula

For a revenue sharing decision-tree based on the models and formulas used by federations, please contact Linda Mollenhauer

Promote and safeguard the federation brand

(Brand is more than the name and logo of the organization. It refers to how the federation is viewed in the minds of stakeholders. It includes the 'personality' and reputation of the federation which are driven by such things as values, accountability and performance.)*

Checklist of Good Practice:

- € The federation brand attributes are clearly understood (e.g. if integrity is an attribute, everyone has a shared understanding of what it means and how it is accomplished by partners in the federation).
- € The attributes that are protected are comprehensive and include such areas as ethics, professionalism, accountability, trustworthiness, integrity and financial viability.
- € There is a clear recognition by partners that the brand is protected by what you do, not just what you say.
- € We can realistically protect our identified brand attributes; we have the ability to control them.
- € We have clearly established policies and procedures that protect what is most significant to us. For example, policies might address:

- Financial statements
- Code of conduct
- Fundraising and sponsorship
- Asset utilization
- Conflict of interest
- Good governance
- Risk management
- Debt and liquidity
- Promotional activities
- Consistent program delivery
- Evaluation
- Use of logo and proprietary marks

Develop a system for measuring, monitoring and improving the federation

Establishing standards is a way to build the capacity of all partners by developing expectations, understanding gaps and creating training and education to help partners meet the standards. Standards also create consistent behavior across the federation which will help build and protect the federation brand. Standards can be developed in the following areas:

- Clear and compelling direction
- Rigorous performance management
- Strong Board stewardship
- Well managed human resources
- Financial sustainability
- Positive relationships
- Innovative approaches
- Clear and useful policies and procedures
- Effective use of technology and space
- Program delivery ¹³

¹³ Building Organizational Capacity in Non-Profit Organizations: Linda Mollenhauer see www.mollenhauer.ca

APPENDIX C:

Research Interviews

The Executive Director/CEO of the following organizations participated in an extensive telephone interview. They were asked to share their views about what makes a federation successful and what hinders its progress.

- ALS Society Canada
- Alzheimer Society of Canada
- Alzheimer Society Ontario
- Arthritis Society of Canada
- Big Brothers Big Sisters of Canada
- Canadian Cancer Society
- Canadian Cystic Fibrosis
- Canadian Mental Health Association
- Epilepsy Canada
- Kidney Foundation of Canada
- Make-A-Wish Foundation
- Parkinson Society Canada
- Schizophrenia Society of Canada
- United Way of Canada
- YMCA Canada
- YWCA Canada

Materials Reviewed

The following organizations shared information about the governance, management and operations of the federation, including partnership agreements, governance structure, revenue generation and sharing formulas, values, strategic plans and policies.

- ALS Society of Canada
- Big Brothers Big Sisters of Canada
- Boys and Girls Clubs of Canada
- Canadian Cancer Society

- Canadian Child Care Federation
- Canadian Celiac Association
- Epilepsy Canada
- Habitat for Humanity
- Heart and Stroke Foundation
- Kidney Foundation of Canada
- Make a Wish Foundation
- MS Society of Canada – Ontario Division
- Parkinson Society Canada
- Schizophrenia Society Canada
- Spina Bifida and Hydrocephalus Association of Canada
- YMCA
- YWCA

About the Author:

Linda Mollenhauer has worked for 30 years in the nonprofit sector. She has guided over a 100 organizations toward excellence in organizational development, governance, communication and planning. A primary focus of her work is to design and facilitate processes that ensure clients arrive at the best possible solutions and strategies. Linda has worked with a variety of national charities with federated models to develop the structure, processes, strategies, culture and revenue sharing formula that builds their strategic alliance.

As well, Linda has undertaken research about and for the sector and then translated it into practical resources. They include: *A Framework for Success for Non-profit Federations; Benchmarks of Excellence for the Voluntary Sector; Good Governance: Legal and Ethical Compliance for Charity Boards; Strengthening Collaboration in Ontario's Not-for-Profit Sector; A Culture of Accountability; Building Organizational Capacity; Standards for Success in Volunteer Management; An Inclusive School Culture: Indicators of Success; Power of Persuasion: Developing a Strategic Communications Campaign; Inclusive Organizations: Indicators of Success; Engaging People in Building Inclusive Communities; The Strategic Agency: You have a Plan – Now What?; and a Strategic Planning Toolkit.*

Linda was President and CEO of the Canadian Centre for Philanthropy (IMAGINE Canada). She was responsible for a major shift in direction at the Centre to a focus on advocacy and research. She was also Director of IMAGINE, a national awareness program on giving and volunteering. She has a Master's degree in communication from Boston University and delivered speeches and workshops across Canada, in the United States and Europe. She is currently volunteering with IMAGINE Canada on its development of standards for the nonprofit sector.

She can be reached at 416-767-4059 or mollenhauerl@rogers.com or for more information, go to her website: www.mollenhauer.ca

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(Note: The information in this document draws from many sources related to good governance and organizational practice. The following publications related specifically to federations:

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