



FMA Chicago Speaker Series
Chicago Cultural Center
Success Stories of Nonprofit Mergers & Collaboration
February 9, 2011



The Chicago Speaker Series is an initiative of the Wallace Foundation and Fiscal Management Associates, LLC.

Agenda

Welcome	9:00
Amy Gudgeon, FMA	
Success Stories Nonprofit Mergers & Collaborations	9:15
Hilda Polanco, Founder and Managing Director Fiscal Management Associates, LLC	
Exploring Stories & Lessons Learned	
Panel	9:30
Q&A	10:45
Final Remarks	11:00



Welcome

Amy Gudgeon

Manager, Chicago Office

Project Lead, Strategic Financial Management Initiative

Fiscal Management Associates, LLC



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Professional Services to Not-for-Profit Organizations



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Success Stories of Nonprofit Mergers and Collaborations

Presented by Hilda H. Polanco, CPA, CCSA®

Founder and Managing Director

Fiscal Management Associates, LLC



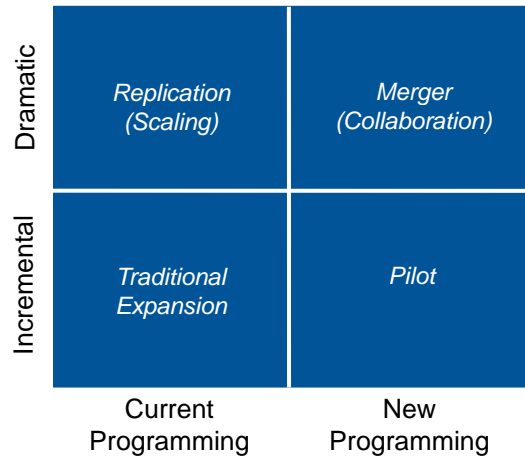
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Types of Growth in the Nonprofit Sector

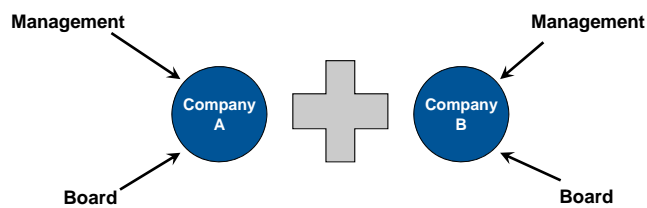


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Mergers in the Corporate World

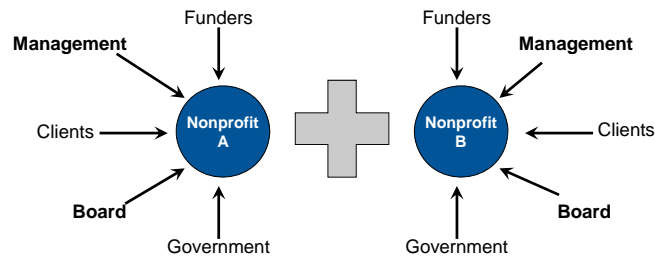


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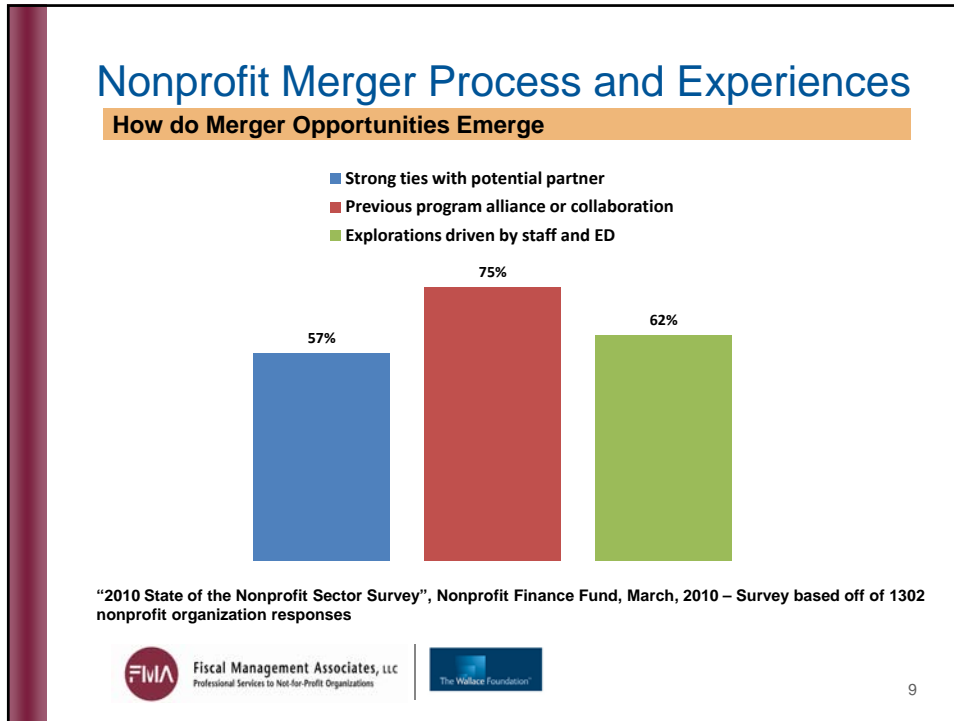
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Mergers in the Nonprofit World



Benefits of Nonprofit Mergers and Collaborations

Reduce Costs	Enhance Programming	Improve Fundraising
<ul style="list-style-type: none"> • Pool resources • Consolidate back office operations 	<ul style="list-style-type: none"> • Broaden & improve services • Expand geographic reach • Reduce sector fragmentation 	<ul style="list-style-type: none"> • Gain access to donors & board members • Enhance marketing pitches



- ## Challenges Facing Nonprofit Mergers and Collaborations
- **Insufficient Funding**
 - **Lack of Leadership**
 - **Cost-Cutting Expectations**
 - **Insufficient Knowledge**
 - **Desperate Motives**
 - **Board Resistance**
 - **Staff Anxiety**
 - **Funder Contradictions**
 - **Finding the Right Name**
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Panel

Moderator: Gretchen Dykstra
Former New York City Commissioner of the
Department of Consumer Affairs



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Panel

Wendy L. DuBoe
Chief Operating Officer
United Way of Metro Chicago

Stephan Russo
Executive Director
Goddard Riverside Community Center

John MacIntosh
Partner
SeaChange Capital Partners

Maria Wynne
CEO
Girl Scouts of Greater Chicago
and Northwest Indiana



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