



ALZHEIMERS AUCKLAND & COUNTIES MANUKAU :: MOVING FORWARD TOGETHER

Alzheimer Auckland Inc. and Alzheimers Counties Manukau Inc. have joined together to form one united organisation – to be called Alzheimers Auckland Charitable Trust...

...For twenty five years the two organisations had operated separately, however in June last year the boards of both organisations started discussions about how we could work together more closely for the benefit of our clients. As a result we merged operationally in November 2010, and we will be legally one within the next few weeks (just waiting on Charities Commission approval of our new Trust deed).

The aim of merging was to release money from management and administration and refocus this into front line services to clients. We are already seeing the benefits, with more staff employed, and increasing client numbers. We have been able to more than double the number of carer education programmes we offer to family members caring for a person with dementia. We will also be able to strengthen some of our infrastructure such as IT and phones through savings made once we have merged two systems into one more modern system. Merging has also increased our fundraising capacity, which will hopefully result in greater financial stability and service capacity in the future.

So the benefits of merging are definitely there. Getting there was a lot of work, and it has been important throughout the process to have a long term focus so that we didn't get bogged down in the detail.

Some key learnings from our experience are:

- > Get professional advice from the beginning of the process
- > Good communication with all stakeholders, including staff, and clients, is critical
- > You will need extra capacity to manage the merger – you might need to buy this in for a time
- > Merging is as much about culture as it is about legal status – each partner's organisational culture needs to be respected in the process
- > Merging is change management
- > It takes lots of time and lots of talk and a good plan
- > You can operate as one before you become legally one
- > Keeping focused on the big picture and the mission is key

We would be happy to share our experience with any other organisations thinking about joining together in some way.

Bonnie Robinson
General Manager

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