

# **a question of unification**

**Prepared by: Azimuth Consulting,  
2760 Belmont Ave  
Victoria BC, V8R 4A8**

**Prepared for: Fernwood Community Association and  
Fernwood Community Centre**

**July 9, 2004**

## Contents

Project Mandate	1
Findings	1
Recommendations	4
Appendix	
Project Background	i
Conversations: From Whom We Heard	i
The Sessions: How We Started, What was Asked	ii
Definitions	iii
Baseline Responses: What You Said	iii

## **Project Mandate**

The Project mandate was to determine 1) the degree to which the Fernwood Community Association and the Fernwood Community Centre have interest in a closer, more formal collaboration, and 2) if sufficient interest emerged, what form such collaboration might take. To make such a determination, community conversations were held with 86 FCA and FCC members, staff, volunteers, and interested community members, in group and individual settings. Input was also invited from approximately 70 participants attending the Fernwood Community Visioning Forum held on May 29, 2004.

## **Findings**

On balance, the majority of people interviewed believe that a greater community good would be served by a more formal operational link between the two organizations. By and large people interviewed also believe that the most productive model for clarifying and simplifying community advocacy and program delivery would be a single operation. When asked to describe what that might look like most people felt a single operation would be one organization with a single budget; integrated program, advocacy and operational planning; coordinated services and program delivery; and one management system.

While a majority of people interviewed could not imagine why the groups should not become a single operation, others felt that such an endeavour would be at best challenging, at worst so complex and difficult as to alienate or drive away some members of both organizations. However, input from all but the most opposed believe the eventual, practical benefit to Fernwood village and residents would be worth the careful effort. For those in support of a single operation, a unified community voice for Fernwood will potentially increase funding access, provide more influence with municipal and other decision-makers, enhance capacity for providing community services and planning, and allow for greater influence on future community social and economic development, preservation and lifestyle.

Despite the majority support, this unification is not a 'done deal'. There are significant concerns. Chief among them: a potential loss of independence, influence, and individual power; the perception of one or more hidden agendas driving the process; historical barriers based on personality and tradition; the impression that a predetermined outcome is being orchestrated by a few select, non-representative individuals; a perceived conflict between the fundamental mandates of the two organizations; and a possible erosion of existing programs and capacity.

Any move to integrate the two organizations should ensure that these concerns are proactively, publicly raised, thoughtfully considered and addressed.

The progress of any action plan intended to result in the confluence of the FCA and FCC will rely primarily on its capacity to inform, in a timely way, the organizations' members and the broader community about each step as it is undertaken. It will also need to proactively alert interests about each next step before it is taken, establish benchmarks for achievement, timelines, and opportunities for input and decision-making.

To succeed by any measure, the focus of this endeavour must always be to better serve the Fernwood community. The interests of the organizations should be secondary.

It is the consultants' belief that any process of unification must be one which, as much as possible, addresses the concerns from those most opposed. However, while seeking consensus, opposing interests should not be allowed to use process to unduly delay or obstruct reaching the goal of unification. During conversations, it became apparent to the consultants that some community members were sufficiently opposed to the goal of unification that, despite public expressions of support for that goal, efforts would be made within organizations and interest groups to derail the work by raising concerns about process which were disingenuous and intended primarily to undermine progress.

Conversely, it was also apparent from community conversations that a genuine belief exists among some that those most emphatically in favour of unification are pursuing that goal with a zeal and aggression that hides an agenda of consolidating community power in the hands of a few.

The consultants believe that while these positions derive from some realities, neither is entirely reflective of the truth, or the beliefs of the majority of opponents or supporters. Yet the strength of conviction on both sides based on these views has existed for long enough, and been reinforced by enough incidents, to attribute value to them. Work must be done to neutralize the destructive capacity of these perceptions.

Therefore any transition management team selected to facilitate the journey toward unification must challenge the recalcitrance of opponents head-on, and demand that opponents to unification present their concerns publicly and directly. The team must

also demand that supporters of unification undertake the work necessary entirely for the purpose of better serving the community, and not for the purpose of re-distributing power in favour of any individual or group.

To this end, it merits repeating that the process for reaching unification must be open and honest. Transparent, objective process will provide evidence of integrity and neutrality, and will be reassuring and accessible to the wider community. Again, communication and information sharing will be critical.

The substance of the conversations undertaken in this Project support a recommendation to the FCA and FCC to begin the journey toward unification.

## Recommendations

As noted, the substance and reflection of the conversations undertaken in this Project support a recommendation to the FCA and FCC that both groups begin the journey toward unification. The eventual outcome: one organization. Achieving this outcome should take less than one year.

To achieve this alliance, the following steps should be undertaken:

**Step One** The FCC and FCA should produce a Joint Statement of Intent, describing the project goals and commitment of both organizations. This statement might also include a commitment to an open, inclusive process, a timeline, and allusion to the Action Plan to be created in Step Three.

**Step Two** Identify a Transition Team to manage the Project. From members of the FCC and FCA, obtain authority for the Transition team to draft, steer and execute an Action Plan.

**Step Three** Design an Action Plan to achieve the goal of unification. This plan might include, but may not be limited to, actions necessary to:

1. determine resource management issues
2. investigate legal and constitutional requirements
3. propose an operational model
4. propose a process to enable a shift in operational practice
5. survey the community
6. enlist community, government, funder, organizational, and allied support
7. draft the needed paperwork
8. hold regular FCC and FCA member meetings
9. hold regular community meetings
10. create and activate a communications plan
11. establish periodic benchmarks to evaluate progress
12. undertake a founding meeting.

**Step Four** Activate the Action Plan.

It should be noted once again that the actions recommended in this Report are not anticipated to be easy. Yet, on balance, it is the strong belief of the authors that, based on the majority of opinions expressed by participants, the union of the Fernwood Community Association and the Fernwood Community Centre will enhance community service to the neighbourhoods of Fernwood.

## Project Background

Fernwood Community Association (FCA) and Fernwood Community Center (FCC) are independent organizations with their own boards, culture and operational imperatives.

Over the previous decade the two organizations have at times collaborated on specific projects and issues and have periodically considered closer and more formal ties. A Community Economic Development Committee (CEDC), which includes members of FCA and FCC, is a recent example of such collaboration. An outcome of the CEDC's collaboration was consensus that community economic development and other community objectives could better be realized by a more formal working arrangement between the two groups. Consequently, representatives from FCA and FCC created a Request for Proposal that led to a contract with Azimuth Consulting to test community appetite for closer collaboration between FCA and FCC.

In April 2004, the FCA and FCC contracted with Azimuth Consulting to undertake conversations among FCA and FCC Board, staff, volunteers and other interested individuals. Two facilitators animated<sup>1</sup> conversations to explore people's attitudes and opinions toward a closer, more formal organizational collaboration. Azimuth staff also assisted with planning and managing the 2004 Fernwood Visioning Forum, an opportunity to imagine a better future for Fernwood village. One discussion stream within the Visioning Forum sought additional input from the community regarding enhanced FCA and FCC collaboration.

Two Reports will emerge from this Project, this Report on FCC/FCA collaboration, and the Report on Proceedings from the Visioning Forum.

## Conversations: From Whom We Heard

A total of 86 people participated in conversations during the Project. These included group sessions with staff and Board members of both the Fernwood Community Centre and Fernwood Community Association, and a session with community volunteers working with the Community Economic Development Committee. A brief overview session was presented to the Annual General Meeting of the FCA, which prompted separate conversations with some FCA members.

---

<sup>1</sup> The consultants utilize the word *animate* (def. *stimulate, enliven, bring to life*) to describe the process of facilitating interactive conversations.

Individual conversations were had with FCA and FCC staff and Board members who were unavailable for group meetings, and a variety of community activists, residents, and interested others. These conversations were initiated both by Project facilitators and individual community members.

## **The Sessions: How We Started, What was Asked**

In order to ensure a baseline of information, facilitators began each conversation with the same short list of questions, which were asked of every participant. These were not necessarily asked in the same order, but were inserted throughout the conversations to create a comparative set of responses. Many other questions and comments emerged as sessions unfolded

Facilitators advised participants that this Project was in no way intended to be an efficiency exercise or an effort to reduce staff positions or critique staff and/or Board efforts. There was no intent to undermine, undervalue, or judge individuals or organizations, and there was no attempt to justify a foregone conclusion.

Facilitators explained that this Project was an exploration of opinions on bringing the groups closer together, and an evaluation of the appetite for doing so, including an examination of the pros and cons of such an effort from the perspectives of the groups and the community. Participants would consider models and timelines, and be provided with the chance to express their ideas, proposals, questions and concerns.

Participants were assured that all information shared and expressed would be held absolutely confidential insofar as there will be no attribution of comments or any inclusion of names.

Participants were then given a quick overview of the Project's background, the role of the CED Committee, Project sponsors, Project facilitators, other Project participants, the timeline, the role of the Community Visioning Forum, and the hoped-for outcomes.

These are the baseline questions that animated each session:

- 1. Should FCC and FCA work more closely? Why would/wouldn't they?*
- 2. What benefit? To whom? What detriment? To whom?*
- 3. How would it affect the Fernwood community?*

4. *How would it affect/be perceived by external supporters/funders/interests?*
5. *Can FCC and FCA work more closely?*
6. *How would the changes take place? How long would it take?*
7. *What would it look like in the end?*
8. *Who would facilitate the process? Who needs to be involved?*
9. *Where are you in the new model? What, if any, are your individual anxieties about closer ties?*

## **Definitions**

Throughout this Report a variety of terms are used to describe the coming together of the FCA and FCC. In the document text, these are not meant to imply any preferential hierarchy of operational model, but merely to reflect the diversity of language used by participants. In the Report and Recommendations, the consultants choose the word ‘unification’ (def. *coming together of people with similar goals and ideals, alliance or union*) to best describe the operational collaboration being proposed as the preferred outcome for a new FCC/FCA organizational teamwork.

## **Baseline Responses: What You Said**

When asked if the FCC and FCA should work more closely, and why or why not, a strong majority (55) of people said ‘Yes’. Eleven (11) said ‘No’, and a further twenty (20) said they either didn’t know, didn’t feel it was particularly important, or felt that they really didn’t want to venture an opinion either way.

Participants in favour described the positive outcomes of a closer collaboration, suggesting that organizational collaboration would bring a greater sense of holistic community service, with unified programs, one-stop advocacy, storefront access, and an overall better quality of service for the community. Others said that a streamlining of organizations would bring greater efficiency in operations, fundraising, service, planning, organization, and activism.

There was a keen appetite for a sense of increased unity, the perception and reality of one voice acting for whole community. This was seen as a strength of purpose that could bring together common actors, goals, resources to create a force of voice and capacity. Collaboration equals a greater clarity of roles and purpose, an easier access for users, easier understanding by users, supporters, funders, the public, and

community. Common communication provides for better community-wide planning, and less duplication, conflict between and overlap of skills and services.

Bringing the two organizations together would allow a systemic change, which in turn would foster a common system for organizational planning, decision-making, and operating. This in turn reduces reliance on the goodwill, skills, and capacity of individuals, and instead demands a systemic commitment to providing the best possible community service, regardless of the personalities or individuals involved. Fernwood would not have to rely solely on individual commitment or ego to drive high quality community service.

Cooperative use of both organizations' facilities is the best way to utilize capacity and purpose, to serve the whole community. Neither physical plant is in the best possible condition. Pooled maintenance planning and resources would allow for the best possible upkeep and use of the buildings. As well, properties are not being used to capacity, and again, could provide superior benefit to the community with joint use planning.

Re-distributing power more equally would acknowledge the limits of real power, maximize the effect of what power both organizations actually have in the larger community sense, and would require individuals to put aside self-interest in favour of community interest. Unification could move the two groups beyond crisis management to a place where they can create pro-active capacity from pooled human, structural, and financial resources and planning. Blending capacities can intertwine political and program work, benefiting Fernwood at large.

Many thought collaboration would solve the problem of image management, insofar as it would dilute an often-held notion of radical and/or conservative images for both groups. Others felt that unification would deliver greater accountability, that there would necessarily be more community responsibility, less 'buck passing', and more direct community access to the reasons behind the decisions made by the organization.

Some spoke of the need to clarify the 'rules of engagement', to force groups to show how they act for the community, and not themselves. This transparency should reduce needless bureaucracy, decrease the number of required meetings, lower the number of hoops through which community members must jump in order to access or work with the organizations.

Many believe the timing to be 'right', that there is a confluence of circumstances, internal and external, which make it a logical time to consider merger. There is also a strong sense that one large group would provide greater financial accountability, the biggest 'bang for the buck', taxpayer accountability, and by consequence, increased funder comfort and support.

Participants opposed to closer ties between the FCC and FCA spoke passionately about their concern that merger would not address the real issue of power. Now seen as being very unequal, it would be almost impossible to share power fairly if such a sharing began from the existing uneven distribution. Some of these participants thought this to be a symptom of the underlying purpose for these discussions, that those in power now wanted it all, and were using this process to conceal an effort to simply submerge one group within the other.

Some said that the FCC and FCA were simply too different to consider coming together formally. There are different ways of working, the FCA being driven by many individuals, by volunteers, while the FCC is directed by just a few, primarily paid staff. Many referred to a history of 'bad blood', a lengthy background of division, animosity, competition, opposition, of individuals unable to get beyond their own priorities. These participants suggested that both existing groups are much too entrenched to actually make a realistic attempt to merge, regardless of the goals. Often expressed: 'we've always done it this way, our way is the best way'.

There seemed a disbelief in the motivation, a need to see proof that working together is better, for anyone. Reference was often made to the role of ego, of individuals with real or even perceived power being unwilling to relinquish it. Overall, there was expressed, often sadly, a belief that within the FCA and FCC, there exists a resistance to change, that such an endeavour is just too much work, that inertia is paramount, that the 'players' are unreliable. A few said that this idea was not a real issue, that no practical benefit would emerge, that the groups are working well now, serving the community the best way possible, that change for the sake of change is not worth the effort. Others stated that too much risk is involved, risk to existing programs, commitments, and principles.

While in the minority, the concerns expressed by these participants are symptomatic of a discomfort with the idea and reality of formal unification of the FCC and FCA. Their reservations need to be considered in any further plans or actions.

When asked what benefit or detriment would accrue from closer ties between the FCA and FCC, and to whom these benefits or detriments would accrue, the majority of respondents spoke to the benefits.

These included benefits to citizens, in the form of 'one stop services' that are easy to find, access, and understand. As well, funders would see coordination, cooperation, and collaboration among the leading community groups in Fernwood, and would interpret this as the community 'getting its act together'.

Others thought that the staff would benefit from more resources, direction, and information. In that vein, some said that joint resources would reduce duplication, conflict, competition, and overlap, simplifying consumer access and enjoyment of group services. Volunteers would enjoy better planning and organization, while facilities would benefit from global maintenance, and common renovation plans. Board members could share workloads, reduce meeting time, make more efficient use of their volunteer commitments. The global capacity of a blended group would benefit from shared resources, thus providing for greater capacity to build on existing programs and services.

In contrast, some said that significant detriments would arise from closer ties between the FCC and FCA. Among them is the burden on staff from more complicated systems, less direction, and access to decision-makers. In addition, programs could be diluted in quality, quantity, and variety. In general there was a strong sense that whatever happens, the community must not lose anything now in place.

Some said that diversity would be at risk, since bigger often means more homogeneous, less room for difference. In this same sense, others said there would be more bureaucracy from bigger systems, more hoops. Still others said there is no need for change or renovation to the groups, that 'it's not broken, so there is no need to fix it', that simplicity now exists, the roles now clear.

Though expressed by only a few participants, these reservations again show a commitment to the status quo which requires due consideration.

When asked how closer ties between the FCC and FCA would affect the Fernwood community, the majority of participants responded positively.

They cited easier access to programs, services, events and projects, a clarity of roles and functions, unity of voice, more direct service, an increased space capacity, simplicity of consumer access, the development of a broader mandate and a larger area of service, a greater capacity to generate interest in the community, an increase in perceived and real power and a much greater capacity for securing funding, expanding service, facilitating community involvement, and planning future neighborhood use.

A minority of participants stated that they believe FCC/FCA collaboration would reduce diversity, create more conventional programs and processes, limit individual response to individual needs, limit choice, waste community resources by spending time and money on system management instead of program delivery, and reinforce the appearance of a hidden agenda driving a process of manipulation and stakeholder co-opting.

Again, while in the small minority, these comments reflect a need to pro-actively seek out community interests opposed to unification, with an eye to hearing, and doing everything reasonably possible to ameliorate, their concerns.

In response to the question of how unification would be perceived by or affect external supporters, funders, and or other interests, the majority of participants replied positively.

Their comments suggested that unification would reassure funders and encourage them to work more closely with Fernwood, make them 'believe what we say', convince them 'we mean business/are taking our responsibilities seriously/are willing to change', and show 'we are finally getting our acts together'. Fernwood would be seen to be thinking holistically about the whole community, not just FCA or FCC organizational needs or wants.

A collaborative structure would illustrate that Fernwood community leaders are willing to put the past aside, look forward not back, put community needs first, acknowledge the limit of the public funding, think outside the box, look at the big picture, and be fiscally responsible.

In essence, the emergence of a single organizational service demonstrates that the FCC and FCA has put the interests of the community above their own separate organizational interests.

Conversely, those opposed to further organizational collaboration said external interest would not be 'fooled', and would see unification as a sign that the FCA and FCC were just looking for money, or changing to look better, with no real purpose, or ignoring history, commitments, principles and/or individuality, or that the FCC and FCA seem to be giving in to pressures from funders.

Participants expressed the most cynicism when asked if the FCC and FCA can actually work more closely. In response to the question 'can they really do it?', most (43) said 'yes', but with a smaller majority than any other question. Sixteen (16) said 'no', while twenty-seven (27) said they didn't know or couldn't say.

This decline in confidence illustrates the need for careful, transparent project management should the FCC and FCA elect to proceed with some sort of closer collaboration. Whether real or perceived, many participants think history has provided ample example of how, despite their best intentions and efforts, the two groups have failed to deliver real benefit to the community when attempting to reorganize themselves.

By way of illustration, participants simultaneously expressed their belief that 'its time', but there is 'too much history', that there really is 'no choice but to do it now', but that there is 'not enough motivation', that its 'time to face reality', but it won't work because there is 'too much ego at play', that the FCC and FCA 'must work together to serve the community, not ourselves', but 'nobody trusts the other side'. This divide continues to be reflected in statements that 'FCC and FCA must be motivated by a desire to do what's best for Fernwood', but the 'wrong people are running the show – they're in it for their own interest'.

Those supporting closer collaboration expressed frustration that the FCA and FCC seem reluctant to realize that its 'not about the groups, its about the community', that 'Fernwood isn't served by being divided', 'we have the right people, just get on with it', 'we can make history if we act now', and that 'we can put community ahead of our need to be in charge'.

Conversely, others expressed their beliefs that it is 'the wrong time', there is 'not a big enough crisis to push us into it', that 'we shouldn't let ourselves be pushed', and ultimately that it's 'not worth it'.

Once again, though in the minority, these comments provide insight into the level of anxiety that exists with regard to unification of the FCC and FCA. There exists, to

some degree, a perception that even if unification is motivated by increased community benefit, organizational history, personalities, and reality suggest the two groups can not put aside their own interests sufficiently to get to a common table. Should the decision be taken to work together, at each step towards the goal, specific effort must be made to illustrate the goal of, and commitment to, unification.

Participants were asked how changes should take place, and how long it should take to complete the tasks. They suggested a variety of methods, from an organic, evolutionary progress to specified steps and stages with joint board meetings, and general member meetings.

There should be a plan drafted for incremental change, presented to members of FCA and FCC for approval. There should be a test of the plan with the local community. Consideration must be given to various legal, constitutional, operational, and financial options. The plan must enlist community, government, funder, organizational, and allied support. The plan should establish a transition team, to steer the process and execute the plan. The team should regularly inform the community of progress, and provide ways for the process to be tested for outcomes, inclusion, progress. At every stage, make every effort to get 'buy-in' from key players. Take enough time to ensure quality outcomes and consultation, but not so much process stalls or is interrupted.

These ideas essentially describe the basic blueprint for moving toward unification.

But to what are we moving? Participants considered the question of what 'it' would look like in the end. They proposed one group, one Board, joint advisory committees, joint annual plans, shared resources, representatives from the FCA and FCC and the community on a 'super board', among other models.

While no one model was overwhelmingly supported, the most favoured models, in order from least to most supported, were:

- Independent organizations with new joint planning/advisory board.
- Independent organizations with a shared management/operational board.
- One organization, with two sections independently operated but with complementary areas of responsibilities.
- One organization with integrated operations and management.

Given the concerns raised by participants regarding the quality and transparency of the process for unification, each was asked to comment on who they thought should facilitate such a process, and who specifically needed to be involved.

Almost all participants agreed that any move to amalgamate or bring closer together the FCC and FCA would need neutral facilitators and/or team leaders. There was also near unanimity on the idea that representatives from both the FCA and FCC should be involved in the transition management team, in equal numbers. Some suggested that it is important to also involve, in the transition team, non-aligned community representatives. All acknowledged that topical experts, e.g. lawyers, constitutional drafters, facilities planners, should be available as resources for specific tasks throughout the transition.

FCA and FCC members, the community, and allies must be kept informed, provided with opportunities to comment and advise. There is consensus that the process must be, and be seen to be, fair and balanced.

Finally, participants were asked to consider their own personal stake in any process to change the alignment of the FCC and FCA. Each was asked to imagine where they might be in a new model, and what, if any, are their individual anxieties about closer ties between the two groups.

To the first part, their answers range from absolute commitment, regardless of direction or outcome ('Still on a board, making it work, whatever it takes.'), to undefined interest ('In the picture, don't know where or how. '), to cautious concern ('Watchdog. Observer. ') to flat rejection ('Out the door. ').

Secondarily, they highlighted a variety of priorities needing protection, reservations, concerns, anxieties arising in any evolutionary process. Sample replies, simply listed:

- 'At all costs, protect the charitable tax numbers.'
- 'Don't take away or lose any current program or commitment.'
- 'Balance FCA and FCC interests.'
- 'Make sure community interest is driving any process.'
- 'Don't lose our individuality.'
- 'Try not to end up with less autonomy.'
- 'Don't fail.'

- 'We're doing fine, no need to make work.'
- 'Community is well-served by two groups, can't see real benefit.'
- 'This is someone else's agenda.'