

**UNITED WAY OF GREATER ROCHESTER
SYNERGY FUND POLICY**

*For more information on United Way's Synergy Fund
or to speak with other non-profits that have benefited from the Fund, please contact:
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Overview: The challenges facing non-profits today are of greater magnitude than ever before. To thrive in this environment, non-profits must work together through collaboration and/or affiliation to best serve their direct clients and the entire community. United Way offers help to organizations interested in pursuing this path in partnership with the New York Council of Nonprofits (NYCON). NYCON has experience with the legal, financial, personnel and procedural issues related to affiliations, along with a proven track record in helping agencies from across the state address these challenges. Through our Synergy Fund, United Way brings this expert technical assistance to Monroe County non-profits. United Way covers the cost of the technical support and there is no cost to the participating organizations for the support.

Multi-Phased Synergy Fund Process

Phase 1 - Pre-Negotiations. United Way and NYCON meet with organizations interested in pursuing an affiliation to explore organizational goals, mission compatibility, vision for the affiliation, and potential obstacles. This meeting determines the compatibility of the organizations' goals with the Synergy process and by the meetings conclusion the group determines interest in moving forward.

Phase 2 - Exploratory Negotiations. NYCON provides facilitation and preliminary due diligence work necessary for the parties involved to decide about proceeding to negotiate a re-engineering relationship. This includes a review of basic organizational documentation including articles of incorporation, IRS determination letters, 990s, and financial statements. Board resolutions empowering a taskforce to explore affiliation are provided as are confidentiality agreements to encourage and protect the free exchange of information within the taskforce. Successful completion of phase 2 culminates in a good faith agreement to enter into affiliation negotiations.

Phase 3 - Negotiations and Affiliation Effectuation. NYCON performs all necessary facilitation and work to effect the affiliation. Successful completion of phase 3 culminates in an affiliation agreement.

Phase 4 – Implementation. Upon successfully completing board approved affiliation agreements, the newly structured organization will implement the affiliation. The may include co-location of staff, acquisition of new technology to create a single platform, assimilation of two staff and their cultures into one new team, and/or re-branding work. When affiliations require outside approval, such as may be required by the NYS Attorney General, legal filings will also need to be completed.