

Deloitte x NewSchools Venture Fund  
**Strategic Collaborations  
Webinar 101: Pathways,  
Tradeoffs, and Readiness**

March 24, 2026

**In the chat, share your  
name and where you're  
joining us from!**

# Today's Speakers



**Joanna Burleson**

Monitor Institute by  
Deloitte

*Practice Leader,  
Managing Director*

*Deloitte Services LP*

BOSTON

- Practice Leader and Managing Director of the Monitor Institute by Deloitte—the firm's social sector practice
- 20+ years working with mission-driven organizations
- Specializes in education, workforce, and funder collaborations



**Sarah Brayton**

Monitor Institute by  
Deloitte

*Senior Manager*

*Deloitte Services LP*

SAN FRANCISCO

- Started career in commercial M&A practice
- 15+ years of experience in nonprofit sector
- Specializes in nonprofit M&A, innovation, and strategic planning
- Previous board chair of nonprofit that underwent a merger



**Ricardo Roman**

Monitor Institute by  
Deloitte

*Senior Manager*

*Deloitte Services LP*

WASHINGTON, DC

- 15+ years of experience in strategy consulting across public and social sectors
- 5+ years leading Deloitte's engagement with a national network of high schools
- Specializes in education and workforce development



**Elisha Desmangles**

Monitor Institute by  
Deloitte

*Manager*

*Deloitte Services LP*

WASHINGTON D.C.

- Supports nonprofits on M&A, growth strategy, and operational planning
- 7+ years of experience in strategy consulting across public and social sectors



**Ajay Dayal**

Monitor Institute by  
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*Senior Consultant*

*Deloitte Services LP*

WASHINGTON D.C.

- 5+ years of experience in strategy, operations, and human-centered design with public, private, and social sector organizations

# Today's Agenda & Objectives

- 01 Welcome & Introduction
- 02 Overview of Strategic Collaborations
- 03 The Strategic Collaborations Lifecycle
- 04 Up Next

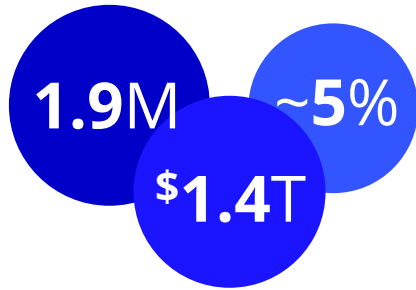
*After this session, attendees will...*

- **Discover emerging trends** shaping nonprofit strategic collaborations
- **Explore the business case** and lifecycle of nonprofit strategic collaborations
- **Identify critical factors** nonprofit ventures should consider when pursuing a strategic collaboration

## 02 Overview: Strategic Collaborations

# National Trends in Strategic Collaborations

Strategic collaborations can offer a proactive path to sustain services, expand reach, and deepen impact — not by scaling back, but by building smarter, more adaptive institutions equipped for the future.



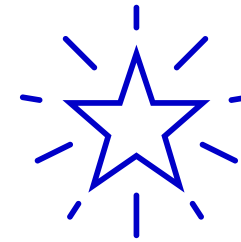
The nonprofit sector continues to **grow** – both in size, and importance

*Over 1.9 million U.S. nonprofit organizations generate ~\$1.4 trillion in economic activity (~5% of the US GDP). Jobs at nonprofit organizations account for roughly ~10% of all national private-sector jobs<sup>1</sup>*



The trend towards collaboration is **accelerating**

*A 2025 survey of nonprofit leaders showed **51%** were very or somewhat likely to merge with another nonprofit in the next 12 months – despite only 19% having done so in the 12 months prior.<sup>2</sup>*



Nonprofits are increasingly interested in **deep collaboration**

*A 2024 survey reported **48%** of nonprofits plan to implement a deeper form of collaboration – strategic partnership, merger, or acquisition – in the next 24 months.<sup>3</sup>*

Sources: <sup>1</sup>Nonprofit Quarterly, *Nonprofits by the Numbers*; <sup>2</sup>BDO, 2025; <sup>3</sup>HUB International Outlook 2025 Report

# What We've Heard from You

Nonprofit organizations are increasingly exploring strategic collaborations but also cite some barriers in their journey.

## Nonprofits are increasingly interested in potential collaborations



Among those whose interest has increased, the top drivers were...

**63%** Desire to increase impact

**59%** Expand Reach of Current Programming

**46%** Expanding Program Breath

However, organizations report these as the most common high barriers for collaboration:

**53%** Finding the Right Partner

**39%** Mission / Vision Alignment

**37%** Resource Constraints

Interest & Experience Across Collaboration Types:

### Strategic Alliance

Open to Exploring **80%**

Have Prior Experience **59%**

### Joint Ventures

Open to Exploring **34%**

Have Prior Experience **10%**

### Mergers

Open to Exploring **29%**

Have Prior Experience **11%**

# The Case for Strategic Collaborations in the Nonprofit Sector

Collaborations can be a powerful tool for growth and greater impact, as well as continuity in times of transition

Nonprofits may pursue collaborations for many reasons...



...and can experience positive outcomes for their mission.

## Collaborate for Growth

Program Offering  
Expansion

Serving More / Different  
Students and Educators

Geographic Expansion

Expanded Funding  
Opportunities

## Collaborate for Continuity

Leadership Transitions

Consolidation of  
Backoffice Functions

Financial Sustainability

**73%**

of nonprofits that collaborated achieved **measurable success**, including expanded services, increased funding and improved program outcomes.<sup>1</sup>

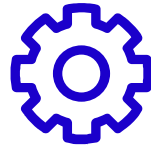
**57%**

reported to have **improved their financial sustainability**<sup>2</sup> after a merger

# Strategic Collaborations Can Drive Significant Value



Greater  
Impact



Operational  
Efficiency



Improved  
Fundraising



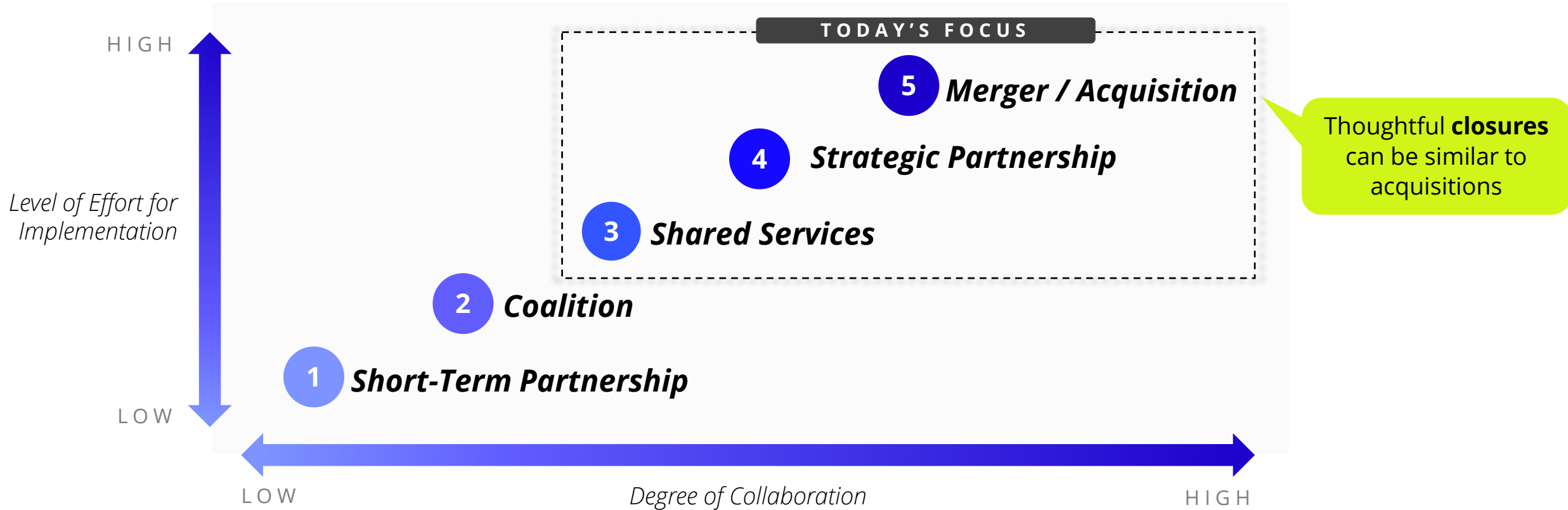
Improved Value  
Proposition



Expanded  
Skill Sets

# Types of Collaboration Structures

Nonprofits can consider strategic collaborations across a spectrum, from short-term partnerships to mergers, to help advance their mission



# About Shared Services

## 3 Shared Services

### What is it?

Shared services enable nonprofits to share operational infrastructure to achieve greater efficiency and reduce costs.

Functions shared in this structure commonly include:

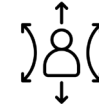
- Finance and accounting
- Human resources
- Technology and cybersecurity

### OUR FOCUS

#### Option 1: Managed Service Organization/Provider

Outsource back-office functions by contracting with a third-party vendor with specific expertise.

Effective for:



Small, nimble organizations

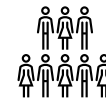


Limited long-term capital

#### Option 2: Joint Contracting

Contract with other nonprofits to jointly hire, pay, and manage back-office staff for those organizations.

Effective for:



Larger organizations



Able to invest for the long-term

# About Strategic Partnerships

## 4 Strategic Partnership

### What is it?

Although they can take many different forms, strategic partnerships are characterized by a few key criteria:



Core to the mission



Deep 1:1 collaboration



Extended duration

### Joint Venture

Enter a formal relationship involving shared control through a parent–subsidiary structure, joint board, or jointly owned entity. Legal identities may remain separate, but governance and strategic decision-making are shared

### Jointly Run Program

Pool resources and share risks/rewards to launch a new program or initiative.

### Strategic Alliance

Formal collaboration to achieve shared goals by sharing staff or expertise, and collaborating on shared projects while maintaining separate legal entities.

*Most structured*



*Least structured*

# About Mergers & Acquisitions (M&A)

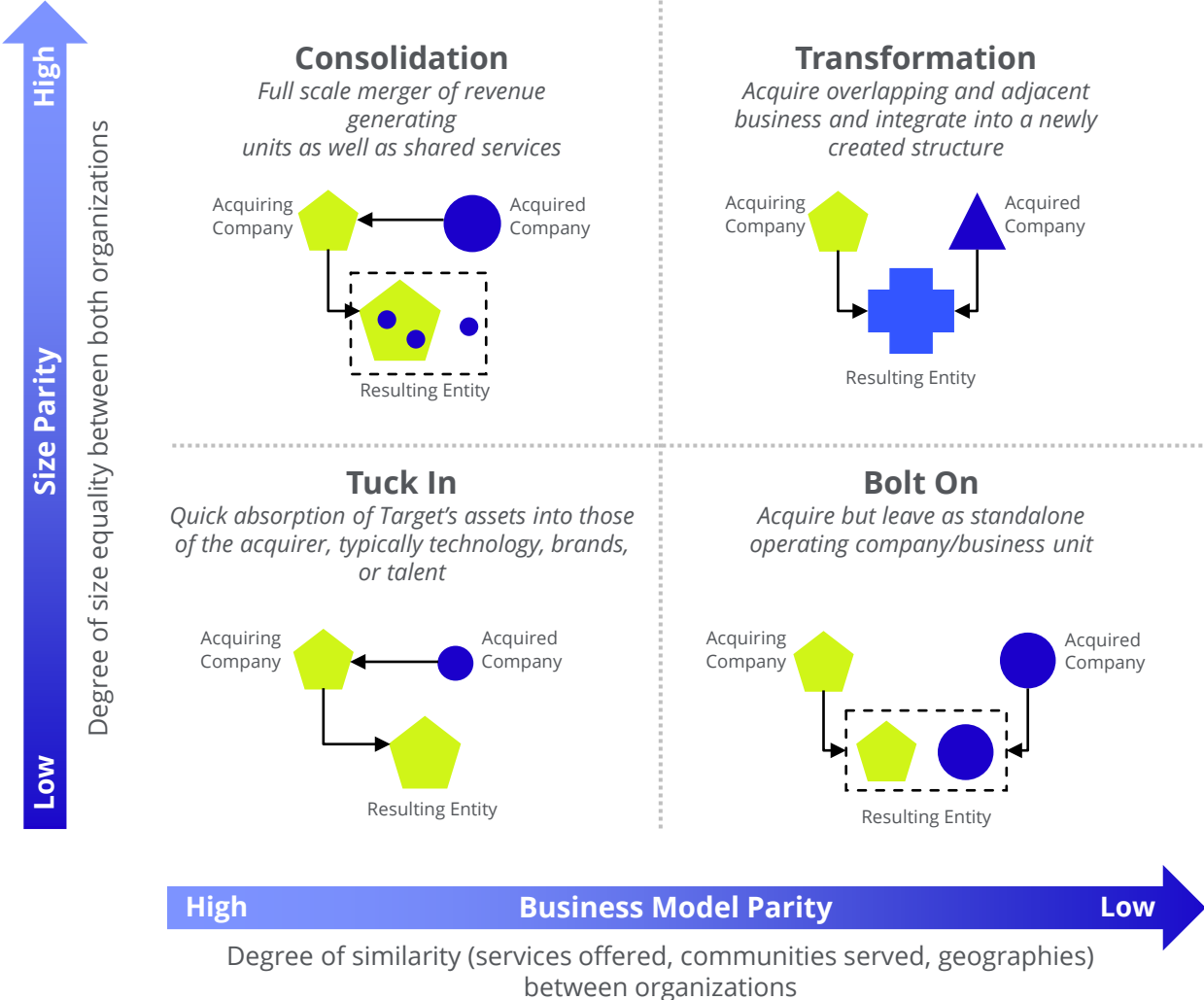
## 5 Mergers & Acquisitions

### What is it?

An acquisition is when entities legally combine into a single entity, with integrated

- Governance
- Staff
- Programs
- Operations

Typically pursued when alignment is high and long-term unification is needed to strengthen mission delivery.



# Key Differences Between Nonprofit and For-Profit M&A

Key distinctions in motivations, structures, and stakeholders shape how M&A is approached in the nonprofit sector compared to the commercial sector

DIMENSION	CORPORATE M&A	NONPROFIT M&A
<b>Intent</b> 	<ul style="list-style-type: none"> <li>Financial Return</li> </ul>	<ul style="list-style-type: none"> <li>Mission Advancement</li> </ul>
<b>Control Structure</b> 	<ul style="list-style-type: none"> <li>Equity Ownership Transfer</li> </ul>	<ul style="list-style-type: none"> <li>Control shifts via governance, leadership, and asset transfer</li> </ul>
<b>Value Realization</b> 	<ul style="list-style-type: none"> <li>Shareholder Return on Investment</li> <li>Cost synergies</li> </ul>	<ul style="list-style-type: none"> <li>Greater mission impact</li> <li>Operational efficiencies</li> </ul>
<b>Funding Model</b> 	<ul style="list-style-type: none"> <li>Finance through internal capital</li> </ul>	<ul style="list-style-type: none"> <li>May require philanthropic grant or funding to support integration</li> </ul>
<b>Stakeholders Involved</b> 	<ul style="list-style-type: none"> <li>Investors</li> <li>Regulators</li> <li>Employees</li> <li>Customers</li> <li>Board</li> </ul>	<ul style="list-style-type: none"> <li>Donors</li> <li>Staff</li> <li>Board</li> <li>Beneficiaries</li> </ul>

# 03 The Strategic Collaboration Lifecycle

# The Nonprofit Collaboration Lifecycle

While every collaboration journey is different, this illustrates a typical path; including the phases, decisions, and governance milestones that shape it.



PULSE CHECK

## Where are you in the strategic collaborations lifecycle today?

*Choose one*

- Interested, but not in active conversations
- Just getting started
- Strategy
- Due Diligence
- Integration



# The Nonprofit Collaboration Lifecycle

While every collaboration journey is different, this illustrates a typical path; including the phases, decisions, and governance milestones that shape it.



# Strategy | Developing your collaboration approach

It is helpful to think about how strategic collaborations can help achieve your organization's growth ambitions, and criteria for ideal partners



A nonprofit's organizational strategy defines its mission and strategic goals, including objectives for growth....

- Define whether your org is pursuing **growth** or **continuity**
- Define strategic growth/continuity objectives (e.g., grow geographic footprint)

...As part of this process *(or as a supplement)*, it is helpful to assess the best collaboration approach to achieve your strategic objectives

- If pursuing growth, evaluate whether you should “build”, “buy” or “borrow”
- If pursuing continuity, evaluate whether you should “switch”, “sell”, or “sunset”

...From here, organizations can leverage criteria to profile and prioritize potential partner organizations...

- Develop and **refine partner criteria** (e.g., size, values, capabilities)
- Profile and **screen potential partners**
- Develop **shortlist for exploratory conversations**

## Collaboration Approach

# Strategy | Collaboration Approach: Build, Buy, or Borrow

Identifying a collaboration approach for organizations seeking growth includes getting clarity on effective paths to achieve growth objectives: organically (Build), through acquisitions (Buy), or through partnerships (Borrow)



### Growth Focus

Strategic collaborations can provide an opportunity to scale rapidly and efficiently, depending on your strategic objectives.



**Build:** Develop the needed capability internally using the organization's own resources.



*Does not require collaboration*



**Buy:** Acquire a capability permanently by combining assets and talent.



**Merger / Acquisition**



**Borrow:** Obtain capability through partnership, essentially "renting" access instead of owning it outright.



**Strategic Partnership  
Shared Services**

**Collaboration Approach**

# Strategy | Collaboration Approach: Switch, "Sell," Sunset

Identifying a collaboration approach for organizations focused on continuity includes getting clarity on effective paths to continue making impact: organically (Switch), through transitioning assets to another organization (Sell), or through thoughtful dissolution (Sunset).



**Continuity Focus**

Strategic collaboration options are more limited but can provide an opportunity to continue making impact.



**Switch:** Pivot the organization’s business model to capture new opportunities or streamline costs.



*Could involve collaboration*



**"Sell":** Transfer assets and talent to one other organization that can carry forward the work.



**Merger / Acquisition**



**Sunset:** Dissolve the organization, with the opportunity for assets to live on, either independently or within multiple other organizations.



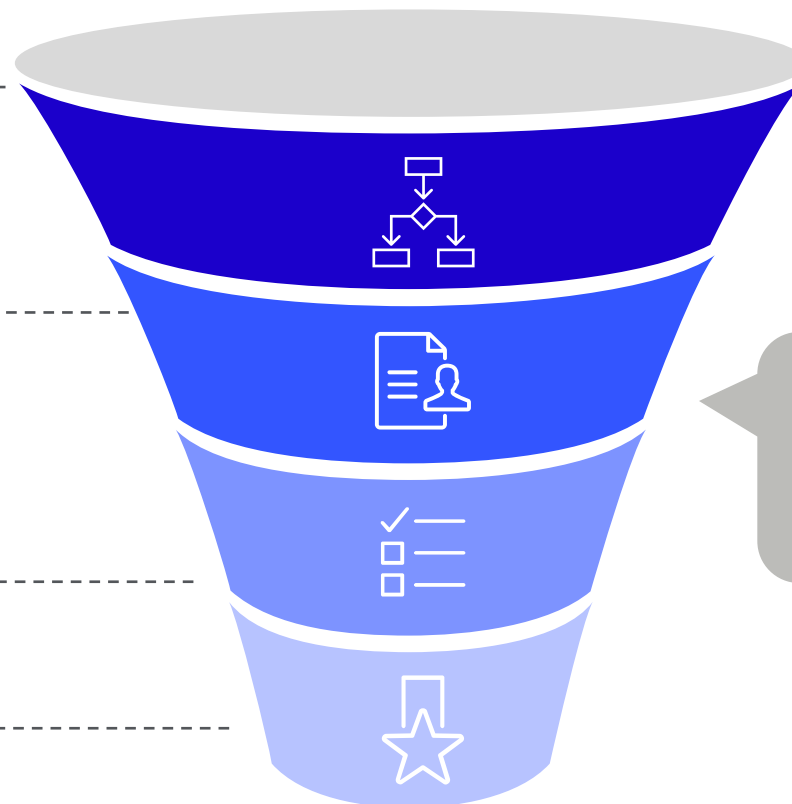
*May not require collaboration*

## Partner Screening

# Strategy | Partner Screening

The partner screening stage helps evaluate potential partners against a defined set of criteria to identify opportunities that can drive the most value and impact

- 1 Develop evaluation criteria and framework**  
*Sample criteria: Mission fit, program alignment, funders and partnerships, financial health, brand*
- 2 Profile potential partners**  
*Source potential partners, drawing on resources such as relationships and funder connections. Research prospects through sources such as 990s, annual reports, and media coverage*
- 3 Screen potential partners**  
*Evaluate prospects based on your criteria*
- 4 Develop shortlist**  
*Identify the best fits for your goals*



Although the steps are similar across both, M&A requires more thorough screening than strategic partnerships and shared services.

# Readiness Assessment

## How It Works

1. Access the assessment using the QR code or link in the chat
2. There will be 12 questions across two dimensions: Strategic Readiness and Collaboration Capacity
3. Submit the assessment to get your scores

## Reading Your Score

You will receive two scores:

### Strategic Readiness

*Have you developed a strong collaboration strategy?*

### Collaboration Capacity

*Do you have the capabilities and alignment you need to execute?*



*Scan the QR code or click the link in the chat to access the assessment*

# Readiness Assessment

## Reading Your Score

Your two scores can help you determine your next steps as you consider whether strategic collaborations are right for you



*Scan the QR code or click the link in the chat to access the assessment*

PULSE CHECK

## Where did you land on the readiness matrix?

*Choose one*

- At the starting line
- Slow down and revisit strategy
- Think about moving to execution
- Ready to explore collaborations



# The Nonprofit Collaboration Lifecycle

While every collaboration journey is different, this illustrates a typical path; including the phases, decisions, and governance milestones that shape it.



# Due-Diligence | Core Areas to Evaluate

Due diligence tests the strategic, financial, cultural, and operational viability of a potential collaboration. Both organizations engage in structured analysis to confirm alignment, surface risks, and assess whether integration is achievable — and worth pursuing

## Mergers



## Example Questions

- What are stakeholders saying?
- What is the value?
- What are the risks?
- Why do this now?
- What are the next steps for implementation?

# Due-Diligence | Core Areas to Evaluate

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## *Strategic Partnerships*



## Example Questions

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# Due-Diligence | Core Areas to Evaluate

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## *Shared Services*

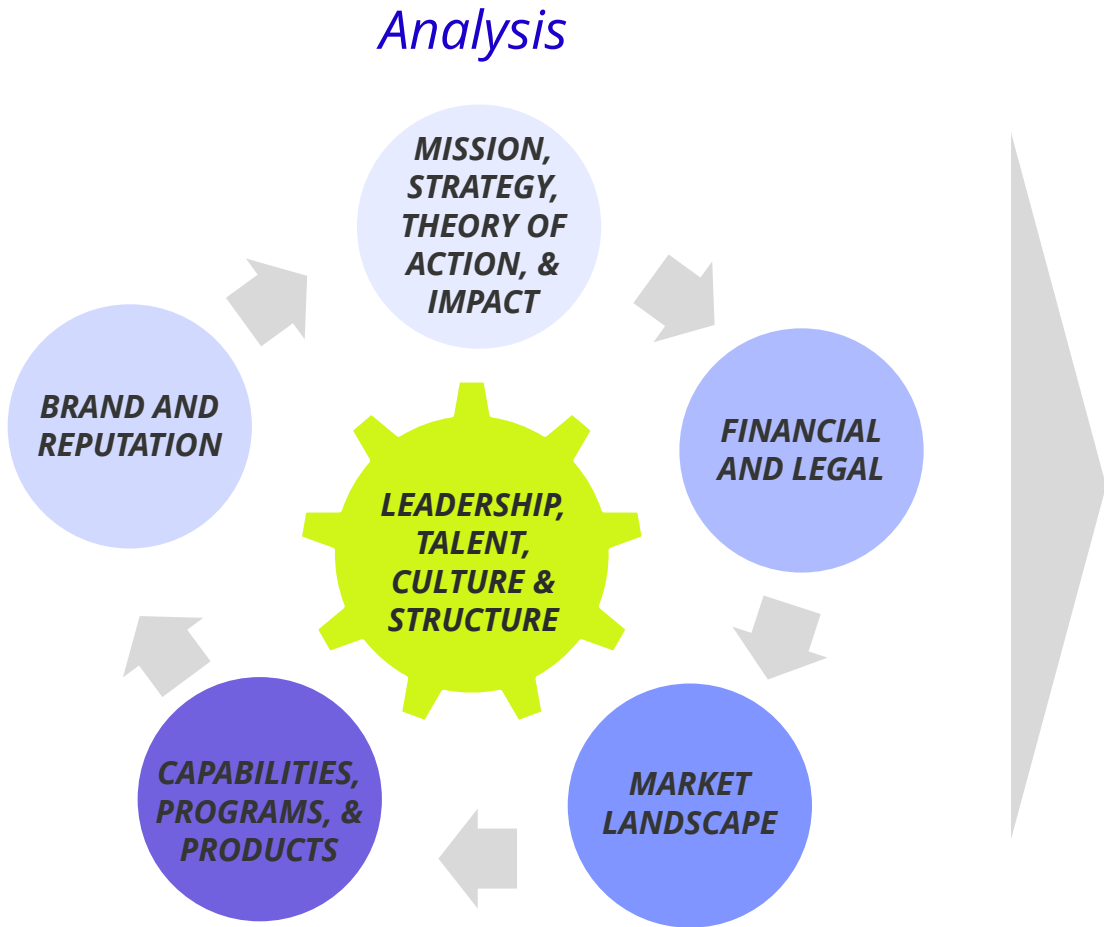


## Example Questions

- What are stakeholders saying?
- What is the value?
- What are the risks?
- Why do this now?
- What are the next steps for implementation?

# Due-Diligence | Moving from Analysis to Decision Making

Due diligence equips boards and leadership teams with the information they need to decide whether to move forward with a collaboration



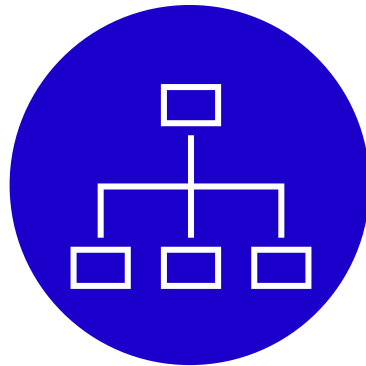
# Critical Path Decisions | Go/No-Go Decision

Due diligence leads to a set of critical decisions for CEOs, leadership, and boards to consider before moving forward with a strategic collaboration

## Key Decision Points: M&A



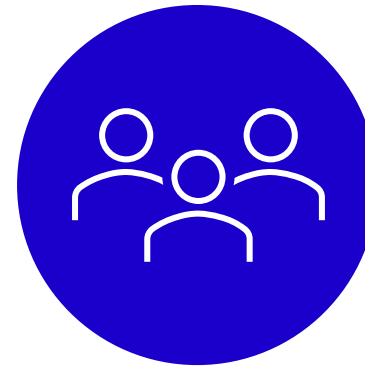
**Legal Entity  
Structure**



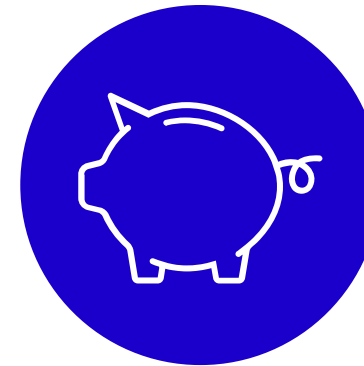
**Board /  
Governance**



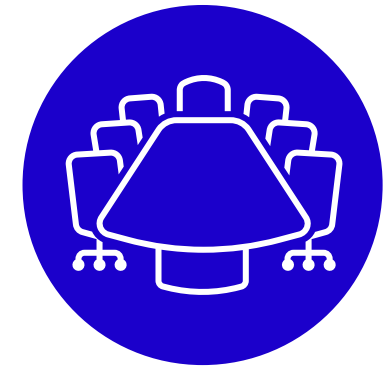
**Branding**



**Organization  
Design**



**Budget**



**Stakeholder  
Considerations**

*PRIORITIES FOR BOARD MEMBERS' FOCUS*

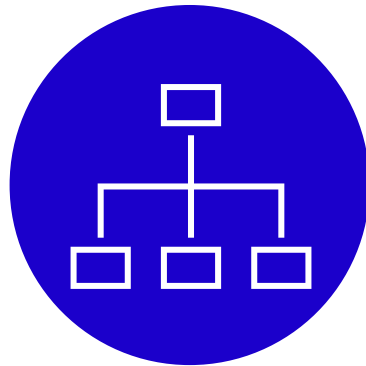
# Critical Path Decisions | Go/No-Go Decision and Negotiation

There are critical decisions for CEOs, leadership, and boards to consider before moving forward with a strategic collaboration

## Key Decision Points: Strategic Partnerships



*Legal Entity  
Structure*



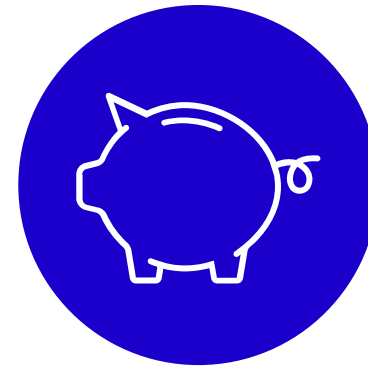
*Board /  
Governance*



*Branding*



*Organization  
Design*



*Budget*



*Stakeholder  
Considerations*

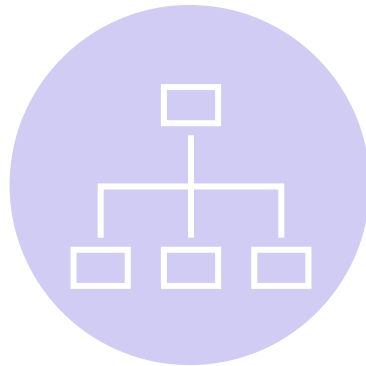
# Critical Path Decisions | Go/No-Go Decision and Negotiation

There are critical decisions for CEOs, leadership, and boards to consider before moving forward with a strategic collaboration

## Key Decision Points: Shared Services



*Legal Entity  
Structure*



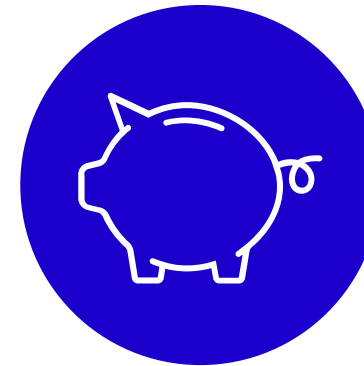
*Board /  
Governance*



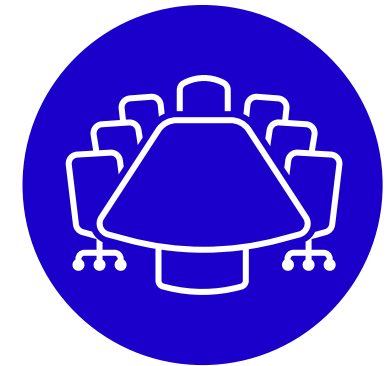
*Branding*



*Organization  
Design*



*Budget*



*Stakeholder  
Considerations*

# The Nonprofit Collaboration Lifecycle

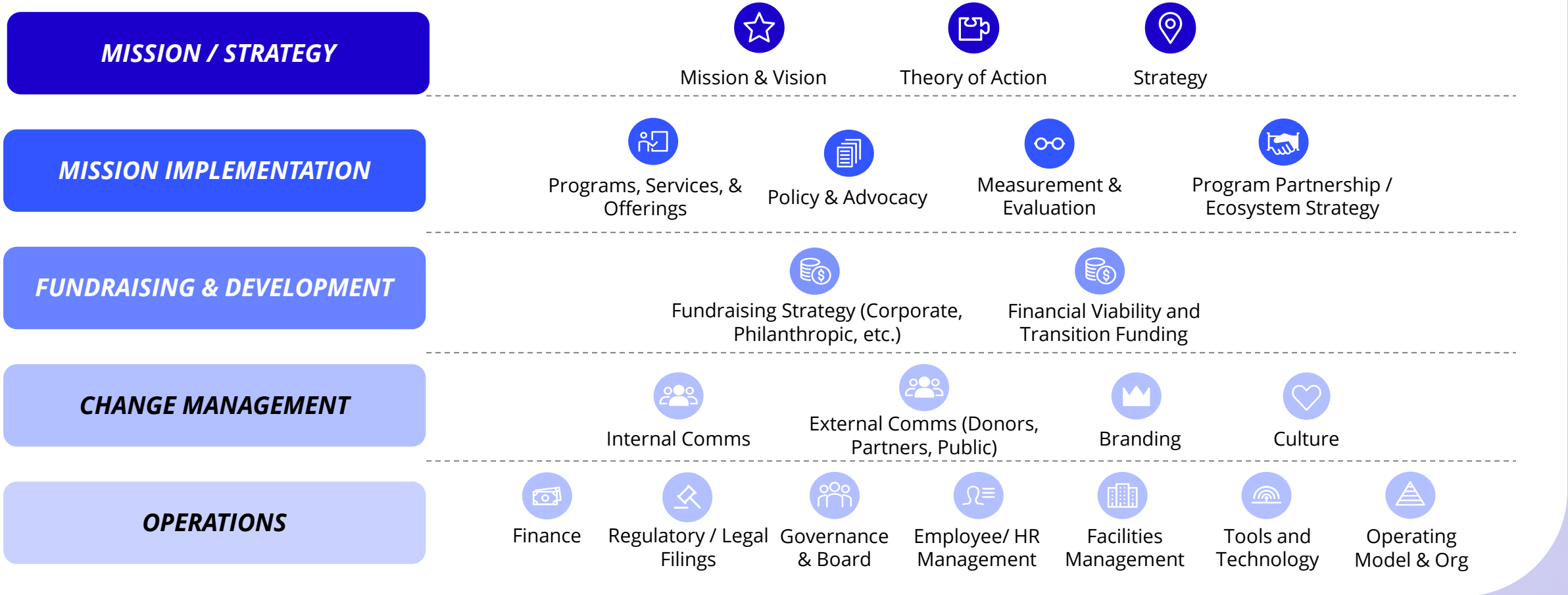
While every collaboration journey is different, this illustrates a typical path; including the phases, decisions, and governance milestones that shape it.



# Integration Planning | Key Integration Areas

Integration Planning focuses on helping prepare the combined organization for Day 1 and beyond

*Key Integration Areas include topics such as*



# Across the Lifecycle: Critical Success Factors to Keep in Mind

These six practices – each critical at a certain point in the lifecycle – can help nonprofits maximize their chances of success and the impact of their strategic collaborations

## **STRATEGY**

### *Have a Vision*

Thinking about how collaboration can be a strategic lever for growth and what the ideal potential partner would look like brings intention to the collaboration process.

### *Consider Non-Traditional Partners*

Collaborations with corporations, startups, social networks, and charities of all sizes may help uncover value not previously considered.

## **DILIGENCE**

### *Build Trust*

Alignment between the Board and leadership, strong governance, and transparent communication foster trust and improve results.

### *Take Stock*

Assess organizational assets and weaknesses and share with collaborators to help parties understand where investments are needed.

## **INTEGRATION**

### *Communicate Transparently & Often*

Engage staff, leadership, and boards early and throughout the process. Frequent, honest communication builds trust, manages uncertainty, and helps align stakeholders around a shared vision.

### *Develop Feedback Loops*

Set specific timelines and identify clear roles & responsibilities for staff, and be willing to end the project if outcomes are not being met.

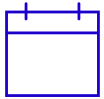
# 04 Up Next

# What's Up Next

Join us for a deeper exploration of the due diligence and integration processes, and to learn from other nonprofit ventures' experience with strategic collaborations

## NEXT WEBINAR

### Strategic Collaborations 201: From Interest to Exploration (and Lessons from the Field)



Date: April 9<sup>th</sup>, 2:00-3:30pm ET



*Register now at the link in chat or by scanning this QR code!*



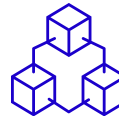
#### What to expect



Learn more about **due diligence** steps for each type of strategic collaboration



Explore key considerations for **integration planning** and execution



Learn from **nonprofit venture peers** that have executed strategic collaborations

Q & A

**Your turn! Any final  
questions on your mind?**



**Thank You**  
for joining Us!

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