

Deloitte x NewSchools Venture Fund

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

April 9, 2026

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
Deloitte

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 Strategic Collaborations Structure & Lifecycle

03 Case Study: Best Practices & Lessons Learned

04 Panel Discussion

05 Q&A

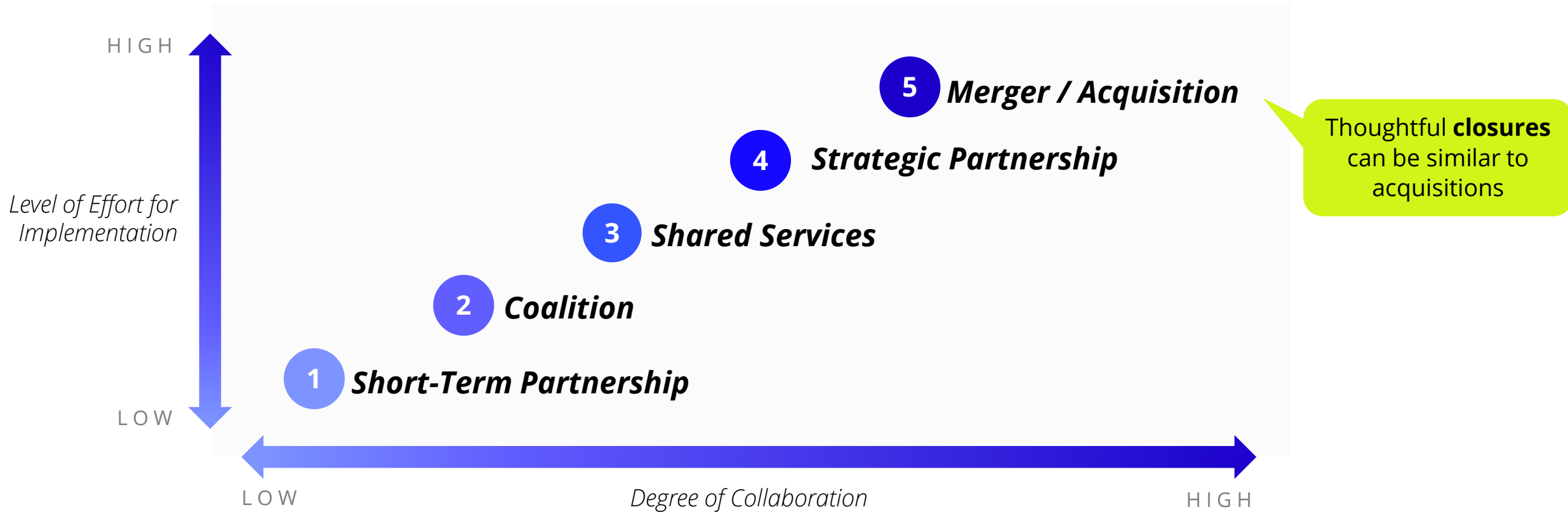
During this session, attendees will...

- Learn about critical success factors nonprofit ventures should consider when pursuing a strategic collaboration
- Hear from peers on their **real-world experience and lessons learned** from pursuing strategic collaborations

02 Strategic Collaborations Structure & Lifecycle

Types of Collaboration Structures

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



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...

Collaborate for Growth

Program Offering Expansion

Serving More / Different Students and Educators

Geographic Expansion

Expanded Funding Opportunities

Collaborate for Continuity

Leadership Transitions

Consolidation of Back-Office Functions

Financial Sustainability



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

73%

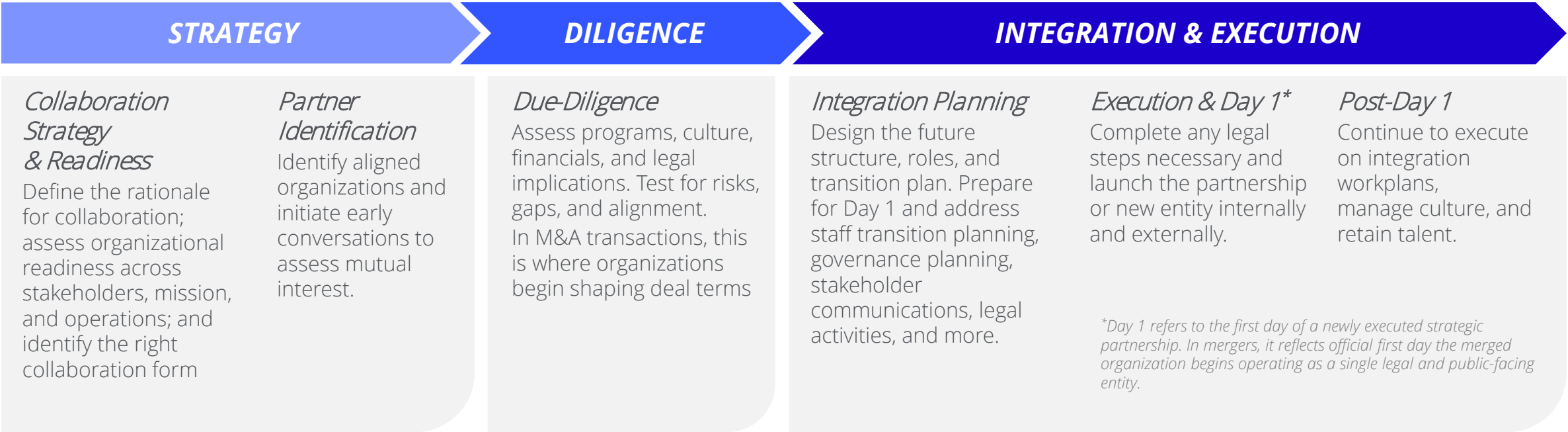
of nonprofits that collaborated achieved **measurable success**, including expanded services, increased funding and improved program outcomes.¹

57%

reported to have **improved their financial sustainability**² after a merger

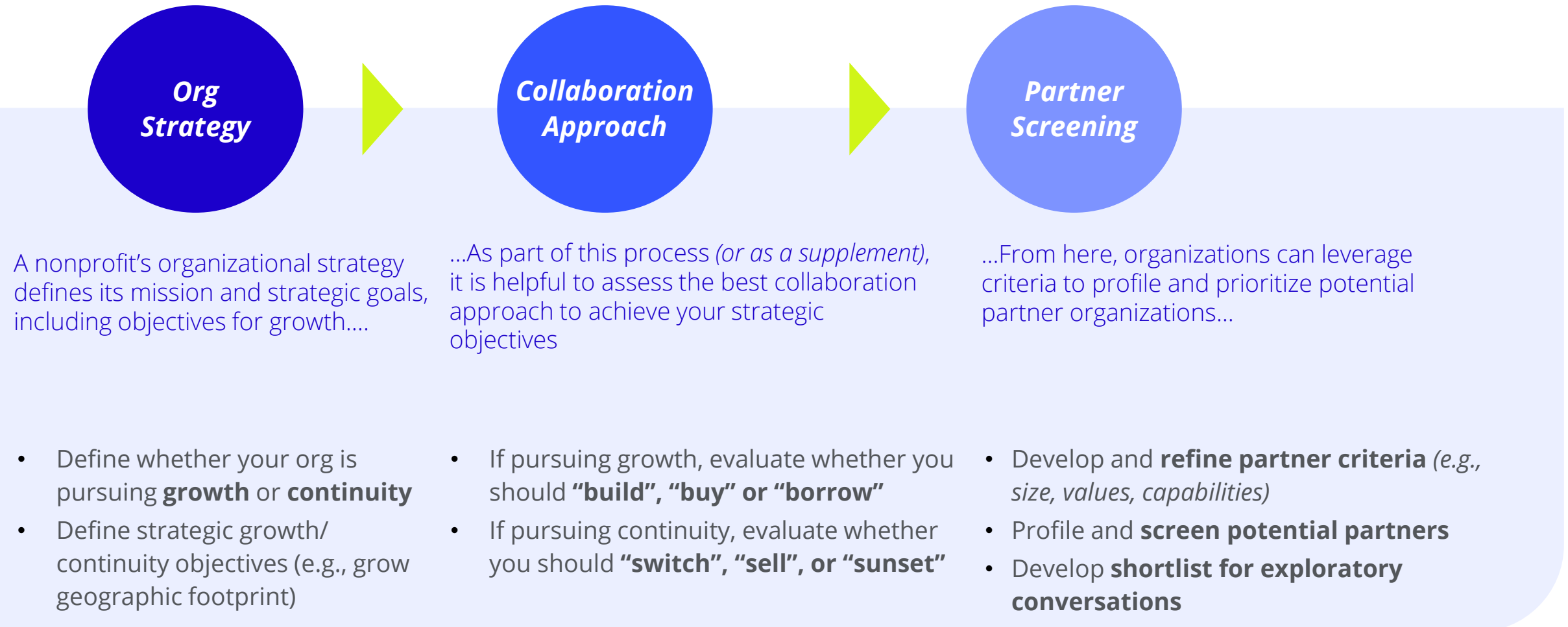
Recapping the Nonprofit Collaboration Lifecycle

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



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

Due-Diligence | Analysis and Go/No-Go Decision

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

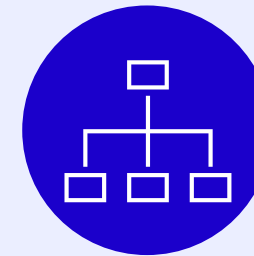
Analysis



Go/No-Go Decision Points



**LEGAL ENTITY
STRUCTURE**



**BOARD /
GOVERNANCE**



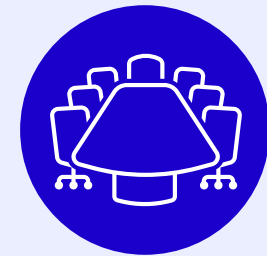
BRANDING



**ORGANIZATION
DESIGN**



BUDGET

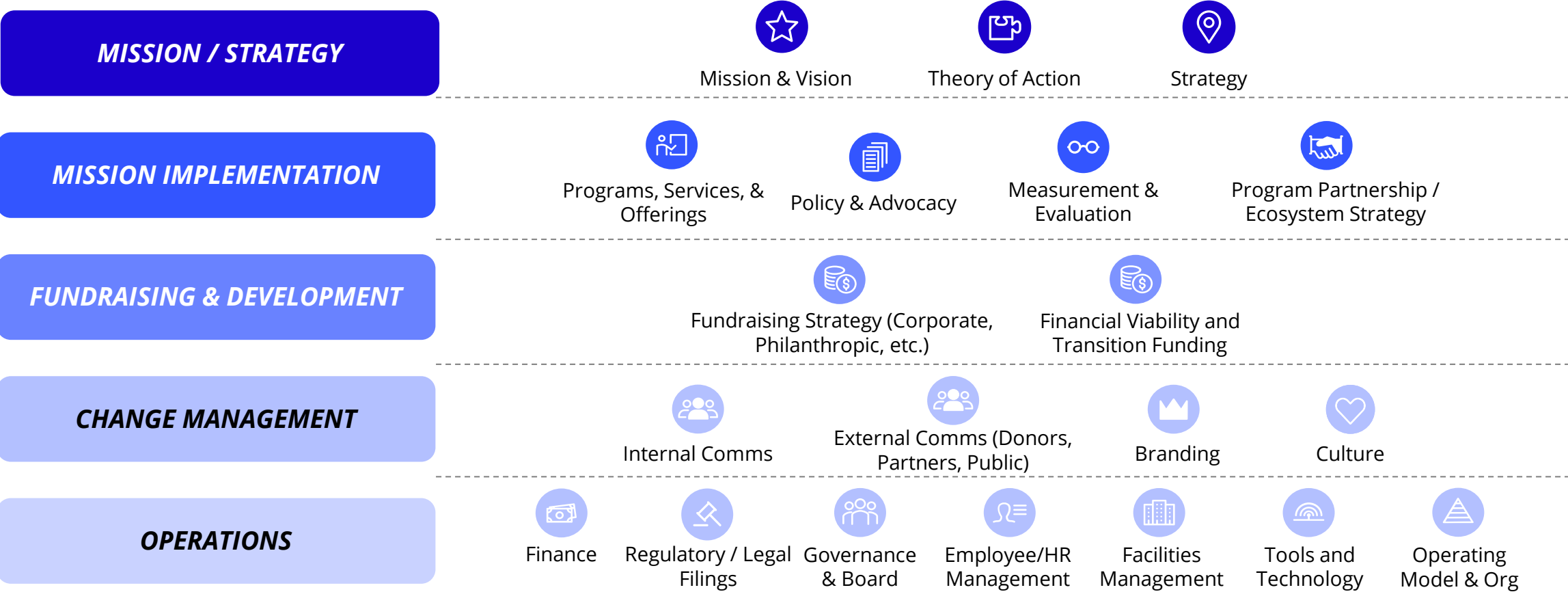


**STAKEHOLDER
CONSIDERATIONS**

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

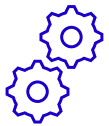


Case Study: BridgeForward*

** This is a fictional case involving fictional entities. Any resemblance to actual organizations is coincidental.*

Case Study: About BridgeForward

BridgeForward helps bring STEM education to 10,000+ students in the Midwest by working with school districts to train teachers.



Organizational Context

- BridgeForward has expertise in facilitating training, not in designing curriculum. Consequently, the **quality of curriculum is inconsistent** across the region
- **Funders and districts** are asking for improvements to the curriculum
- The CEO and Board are looking for ways to **improve quality and consistency**



Strategic Goals

- Improve the **value proposition** to school districts by offering a consistent, high-quality curriculum
- Improve **impact metrics** to make BridgeForward more competitive for funding
- Explore **expansion of offerings** beyond STEM education (long-term)

Case Study: BridgeForward's Build, Buy, and Borrow Options

BridgeForward's CEO is considering the following options:



BUILD

Hire curriculum staff to develop a proprietary curriculum

- Enables development of a **tailored curriculum**
- Requires **specialized talent** and skills
- Involves **long-term talent investment**



BUY

Acquire an organization that specializes in curriculum design

- Enables immediate access to **leading curriculum**
- Enables **rapid deployment**
- Requires significant resources for **integration of different orgs**



BORROW

Partner with an organization that specializes in curriculum design

- **Reduced investment** required
- Provides ability to **deploy quickly and flexibly**
- **Reduces control** and decision-making

QUESTION

What would you advise the CEO of BridgeForward to do?

Choose one

- ☐ **Build:** Hire curriculum staff to develop a proprietary curriculum
- ☐ **Buy:** Acquire an organization that specializes in curriculum design
- ☐ **Borrow:** Partner with an organization that specializes in curriculum design



Case Study: BridgeForward's Build, Buy, and Borrow Decision

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Case Study: Finding a Partner for BridgeForward

To find the right partner, BridgeForward...



Conducted a **landscape analysis**



Leveraged networks to understand the curriculum development landscape, including trends and leading organizations



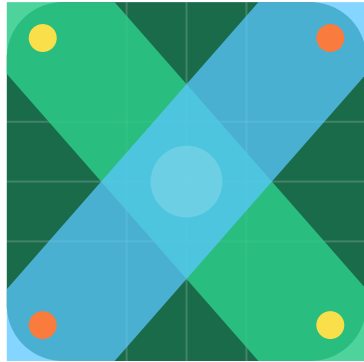
Developed **partner selection criteria**



Prioritized a few key criteria: mission alignment, a proven model, and financial and operational stability

Case Study: Potential Partner – Criss Cross Curriculum

BridgeForward identified Criss Cross Curriculum as a potential partner



Criss Cross Curriculum

This is a fictional case involving fictional entities. Any resemblance to actual organizations is coincidental.

About Criss Cross Curriculum (C3)



Mission Statement: Criss Cross Curriculum exists to ensure every K-12 teacher has the tools and support they need to ignite a lifelong love of learning in their students, regardless of ZIP code.



Location: Boston, MA



Legal structure: Public Benefit Corporation (for-profit)



Experience: 15 years

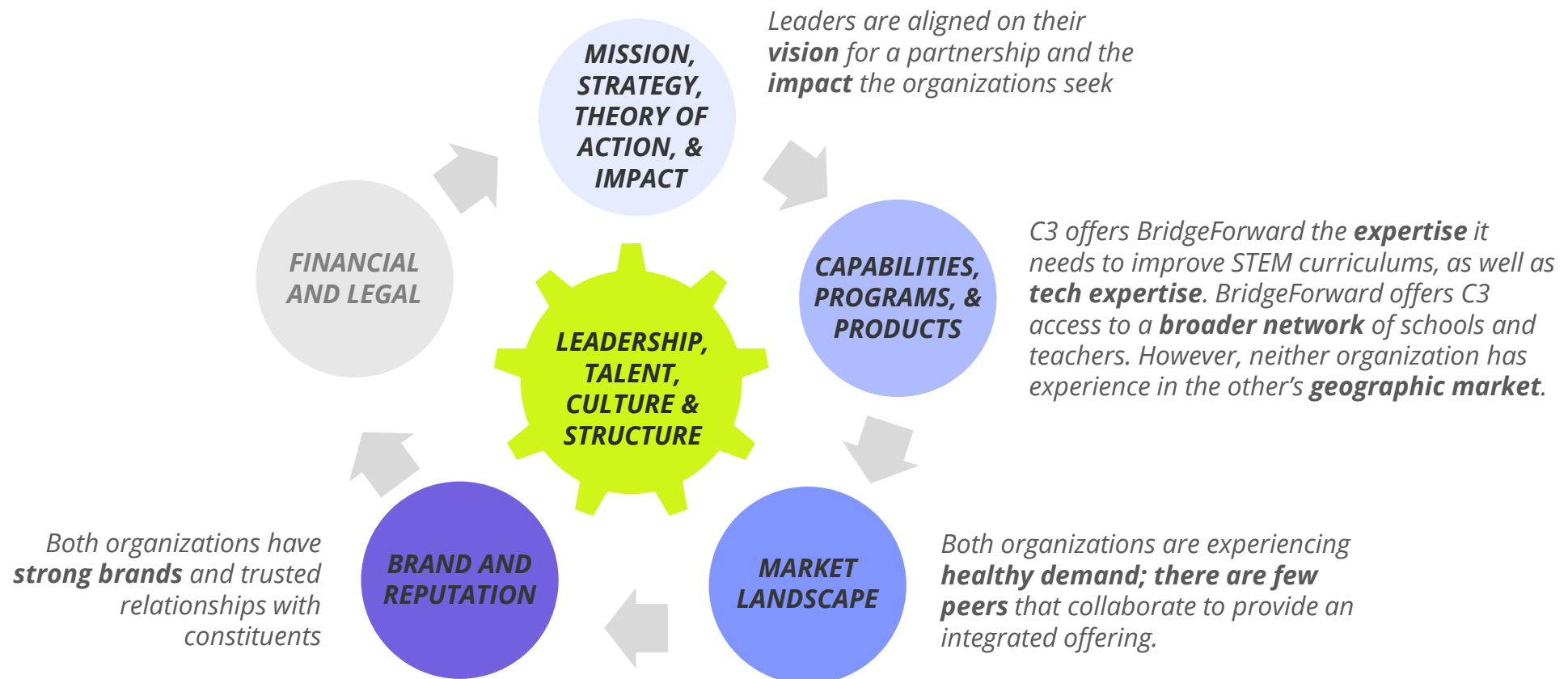


Programs and Products:

- Curriculum frameworks for STEM and other subjects
- Teacher professional development resources
- Developing an AI tool to provide individualized feedback on teachers' lesson plans based on C3's curriculum frameworks

Case Study: BridgeForward x C3 Strategic Partnership Due Diligence

High level insights from due diligence



Case Study: BridgeForward and Criss Cross Curriculum's Partnership

Fast forward 5 years, the strategic partnership is thriving...



Criss Cross Curriculum (C3) has helped BridgeForward implement a **consistent, best-in-class STEM curriculum** that fits the needs of Midwest school districts



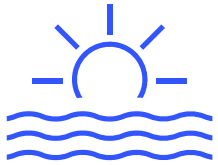
BridgeForward has helped **bring training expertise** to the school districts C3 serves in the Northeast



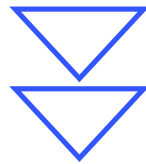
Both organizations **jointly facilitate trainings** for teachers and are **gathering feedback data** that helps improve their programs

Case Study: BridgeForward and Criss Cross Curriculum's Partnership

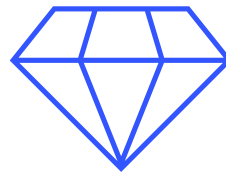
...and there is a business case emerging to explore a merger



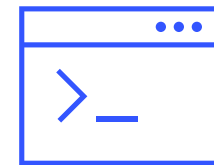
C3's founder is retiring and looking for a new leader. BridgeForward has a **funder interested in supporting** a deal



Full integration from curriculum **development to deployment**



Could strengthen **value proposition** to funders and school districts



Opportunity to co-invest in the development of **C3's AI tool**



Leaders and staff have formed close working **relationships**

QUESTION

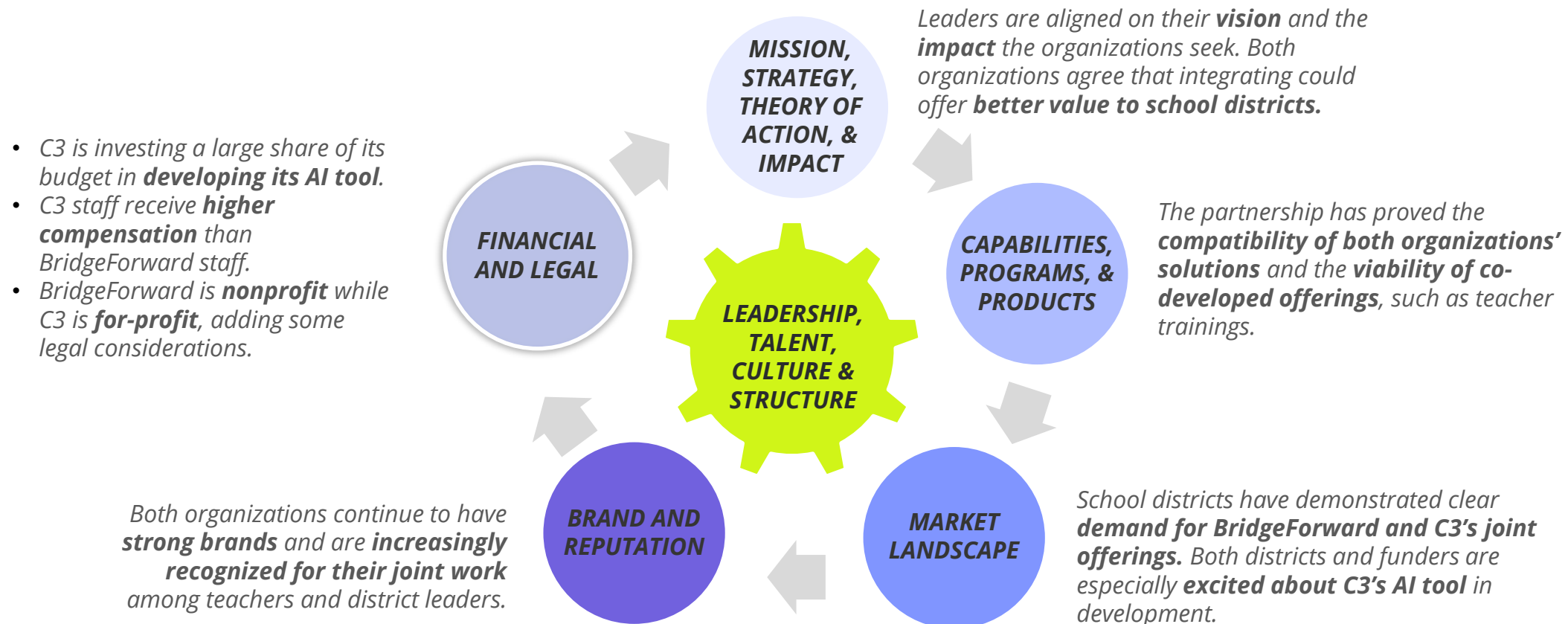
**What would you evaluate
to build on the previous
due diligence?**

Enter responses in the chat



Case Study: BridgeForward x Criss Cross Curriculum Strategic Partnership Due Diligence

BridgeForward built on their previous due diligence



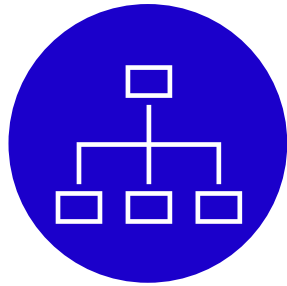
Case Study: BridgeForward x Criss Cross Curriculum Go/No-Go Decision

Both orgs consulted their boards to make a go/no-go decision



Legal Entity Structure

To maintain BridgeForward's 501(c)3 status, C3 would be "bolted on" a for-profit arm of BridgeForward



Board / Governance

BridgeForward's CEO would remain in place and boards would be combined



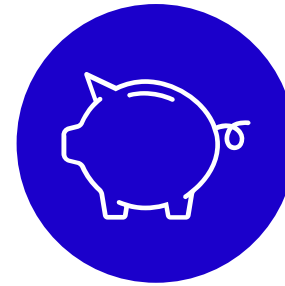
Branding

Given the regional strength of each brand, both brands would remain active under the BridgeForward umbrella



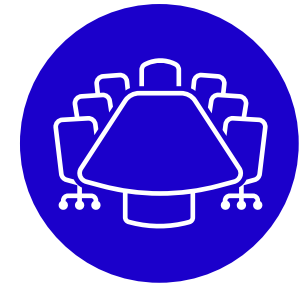
Organization Design

Back-office functions and some program teams would merge, but C3's AI product team would have minimal integration



Budget

A BridgeForward funder is willing to support legal, strategy, and brand advisors



Stakeholder Considerations

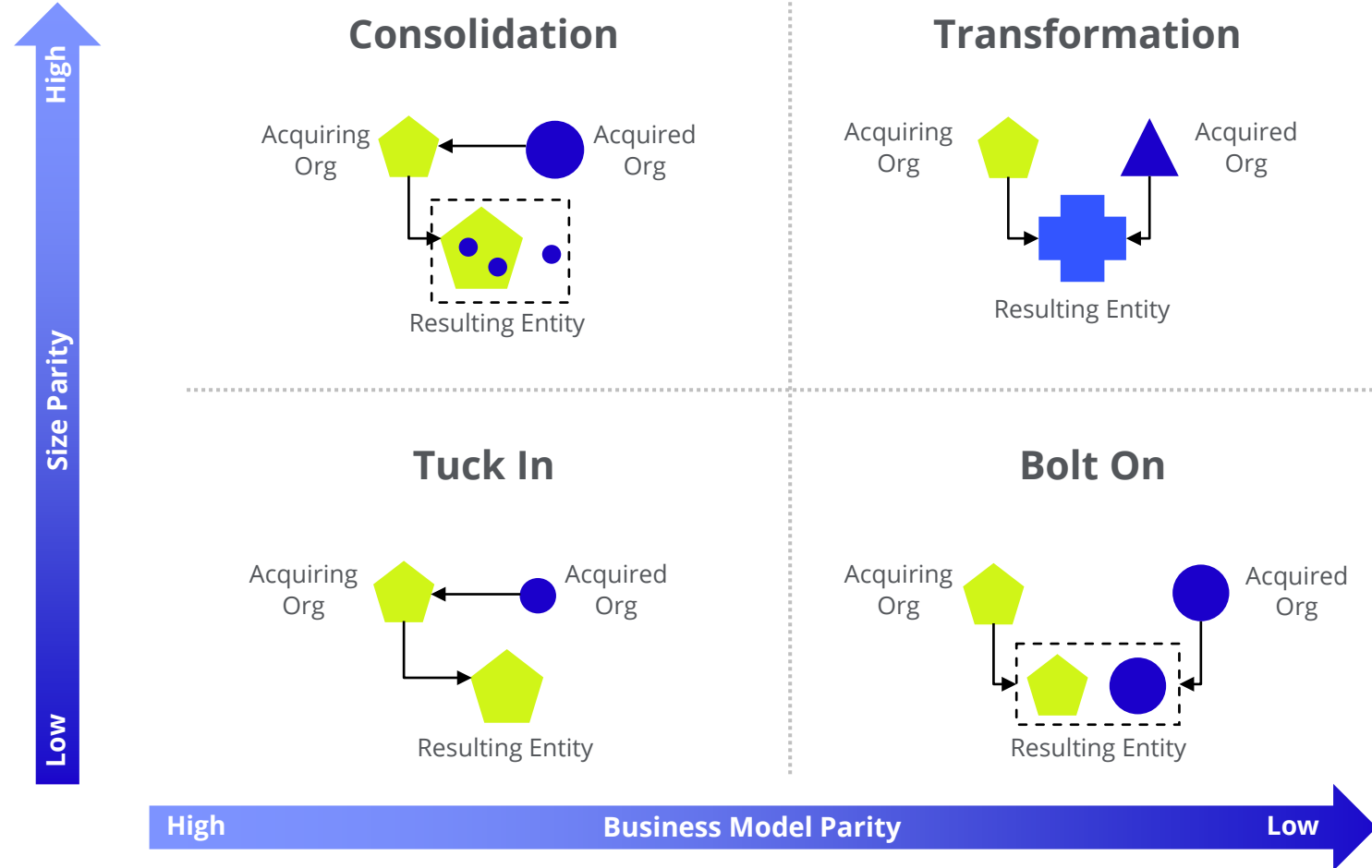
Funders have been engaged in the due diligence process. The teachers and districts both organizations serve would experience minimal disruption

Case Study: BridgeForward x Criss Cross Curriculum Go/No-Go Decision



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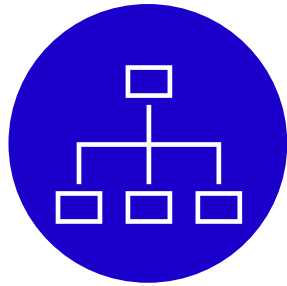
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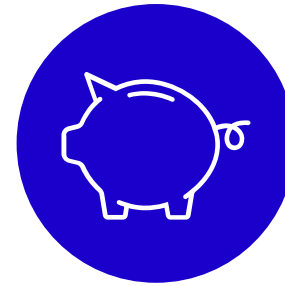
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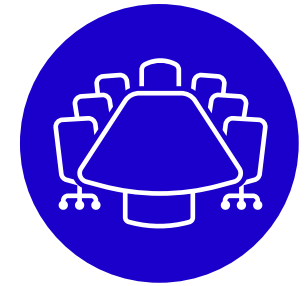
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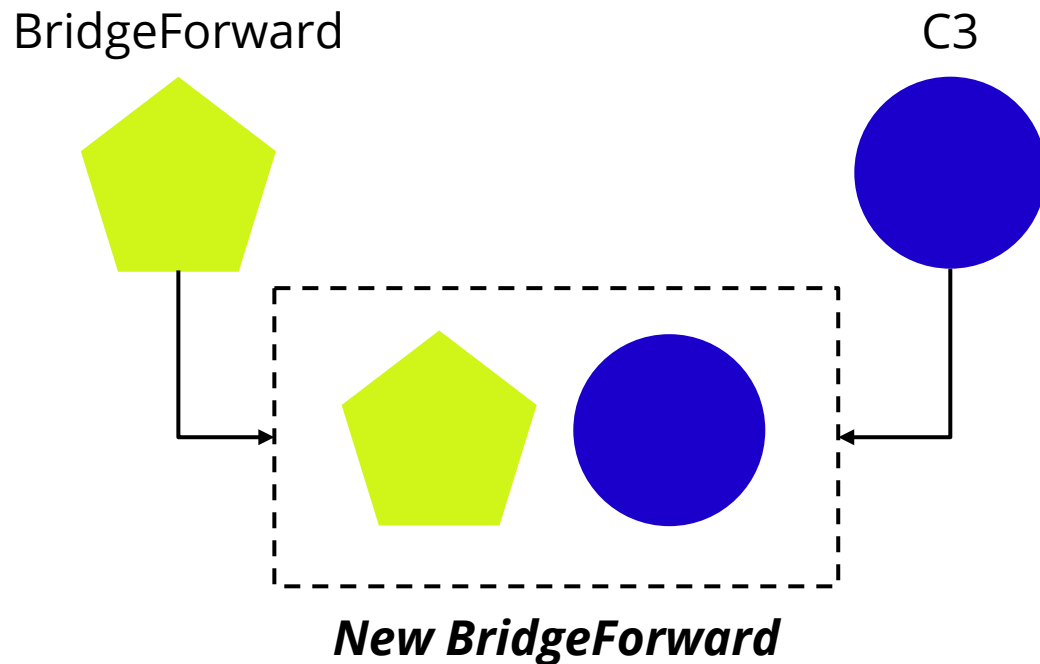


Stakeholder Considerations

Funders have been engaged in the due diligence process. The teachers and districts both organizations serve would experience minimal disruption

Case Study: Choice to Merge with Criss Cross Curriculum

BridgeForward and C3 decide to pursue a **bolt-on acquisition**



What the bolt-on looks like

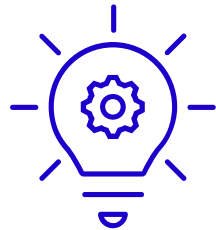
- »»» **Back-office** functions and **some program** teams integrate, but C3's **tech staff** have **limited integration** into BridgeForward
- »»» Some C3 **leadership** join the BridgeForward executive team; **the boards are combined**
- »»» Day-to-day **operations mostly continue separately** for each organization

Case Study: Integrating with Criss Cross Curriculum

The choice to **merge with C3** led to significant benefits...



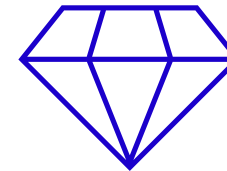
Made operations more **efficient**



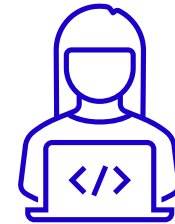
Brought **complementary expertise** under one roof



Opened new **funding** opportunities to pursue more aggressive geographic expansion



Created a stronger **brand and value proposition**



Access to technical **talent** for future development

QUESTION

**What new challenges
would you anticipate this
merger would bring?**

Enter responses in the chat

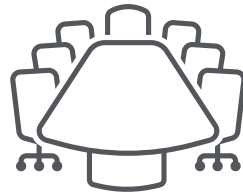


Case Study: Integrating with Criss Cross Curriculum

... but also came with **some challenges**



Day-to-day **culture and operations** differences that never surfaced in the partnership



Establishing new **governance** for the combined organization

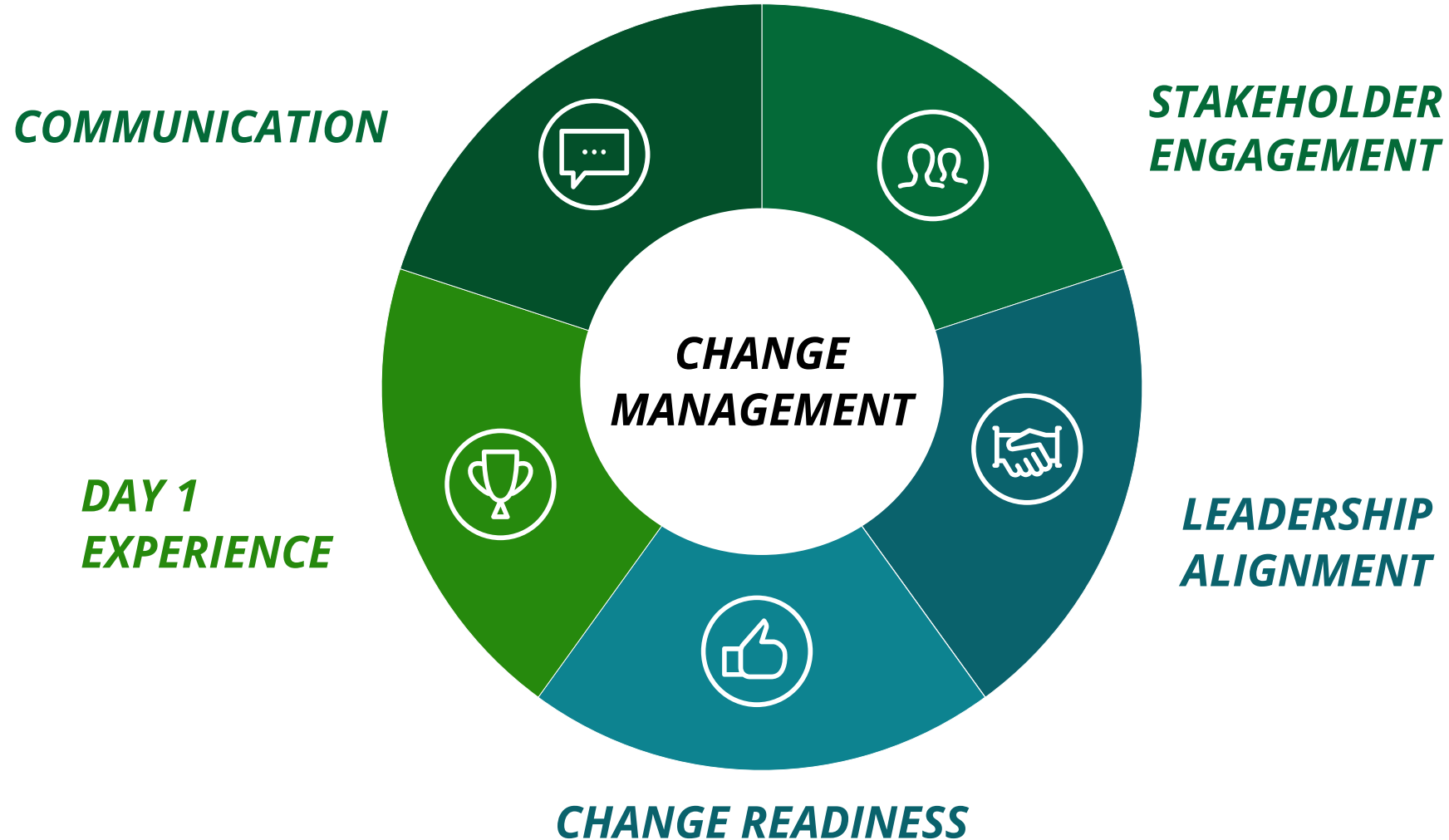


Different **skillsets** and compensation **expectations**



Ongoing **investment** needed to maintain and develop tech

Case Study: Getting Ahead of Integration Challenges

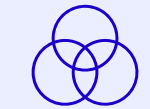


Case Study: Getting Ahead of Integration Challenges

Assessing Organizational Culture



Key Considerations

-  Stakeholder sentiment, especially among leaders and Boards
-  Trust building and shared visioning
-  Assess compatibility early

Case Study: BridgeForward x Criss Cross Curriculum

Key lessons learned

- **Assess organizational alignment, not just mission fit:** Differing compensation and norms created avoidable tension.
- **Compatibility between organizational cultures** should be assessed early, with thoughtful attention to how values, norms, and ways of working will evolve in the combined organization.
- Even when the rationale is strong, nonprofits without tech experience and **tech organizations** may face a more challenging integration phase, given differences in salary expectations, pace of work, the need for ongoing financial investment, and the degree to which leadership understands the technology. Some organizations find value in keeping the acquired tech entity operationally separate (e.g., bolt-on).
- Collaborations between for-profits and nonprofits can help build new capabilities but require careful consideration of **financial and legal implications**.

How to Engage Internal Stakeholders: Starter Checklist of Roles

STAKEHOLDERS



LEADERSHIP



BOARD



FUNDERS



STAFF

STRATEGY

- ☐ Lead internal planning and initial outreach
- ☐ Shape goals and priorities

- ☐ Align on collaboration approach
- ☐ Authorize exploration

- ☐ Test strategic direction
- ☐ Gauge alignment

Often not engaged at this stage

DILIGENCE

- ☐ Coordinate diligence efforts
- ☐ Co-develop operating model

- ☐ Review diligence findings
- ☐ Make go/no-go decision
- ☐ Provide input on legal structure, governance and branding

- ☐ Share emerging rationale
- ☐ Explore interest in supporting diligence and/or integration costs

Often not engaged at this stage

INTEGRATION

- ☐ Guide execution and change management process

- ☐ Hold accountability post-close to ensure value is captured
- ☐ Provide guidance/expertise where needed

- ☐ Keep updated on progress
- ☐ Demonstrate transparency, outcomes, and long-term value

- ☐ Offer opportunities to participate in integration
- ☐ Build feedback loops

04 Panel Discussion

Today's Panelists



John Branam

Bottom Line

Chief Transformation Officer

Executing a merger between Get Schooled and Bottom Line



Sarah Johnson

Relay GSE/Teaching Lab

CEO

Executing a merger between Teaching Lab and Relay Graduate School of Education



Lisa Quay

Lisa Quay Consulting

Principal

Successfully sunset the Student Experience Research Network (SERN)



Leo Bialis-White

Magpie Literacy

Chief Strategy Officer

Recently announced a strategic partnership between Magpie Literacy and Great Minds



MODERATOR

Joanna Burleson

Monitor Institute by Deloitte

Managing Director

05 Feedback & Closing

Share Your Thoughts

We hope you found this webinar insightful and informative. Please share your feedback!

Take 5 minutes to share your feedback in our post-webinar survey at the link in chat or by scanning this QR code!



Thank You
for joining Us!

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