
WHAT WE HEARD REPORT

Amalgamation of Three
Senior Organizations
Feasibility Survey Mar-Apr 2023

ElderActive Recreation Association
Golden Age Society
Yukon Council on Aging

April 2023

FUNDED BY
Department of Sport & Recreation



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Overview

In March 2023, YZED Projects was engaged to develop a Feasibility Study to review options for the possible amalgamation of Three Seniors Organizations. Specifically, our objective was to examine potential organizational structure options for an amalgamated or unified organization that would provide the same services to the membership while reducing the overall administrative burden being experienced and other challenges.

YZED Projects began the work with engagement of members and community to determine the concerns, opportunities and threats to consider as part of the review and feasibility study.

In March, a short survey was distributed to the Board of Directors, Staff, Members, Funders and Community Partners of the:

- Yukon Council on Aging,
- ElderActive Recreation Association, and/or
- Golden Age Society.

We asked for their feedback, ideas and implications as these Three Senior Organizations consider possibilities for the following:

- status quo/ no changes
- some shared services or partial restructuring
- complete amalgamation/merger of these 3 organizations.

All responses will be kept confidential and are used only as a collective and not attributed to any individual.

The following is a summary of “What we Heard.”



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Responses

We received 241 responses to the survey.

20% Board of Directors & Staff (44)

87% Members (195)

Overall impression

We asked: Do you think the following areas would be positively or negatively impacted by partial restructuring or full amalgamation/merger of these organizations?

Responses rated high in all areas for being positively impacted.

	POSITIVELY IMPACTED	NEUTRAL	NEGATIVELY IMPACTED	UNSURE	TOTAL
Capacity (Board, Committees, Staff, Volunteers)	76.32% 145	11.58% 22	2.11% 4	10.00% 19	190
Volunteer Experience	65.24% 122	25.13% 47	1.07% 2	8.56% 16	187
Clarity of Vision/ Mission/ Values	51.32% 97	23.81% 45	7.41% 14	17.46% 33	189
Communication with Members	72.58% 135	17.20% 32	2.15% 4	8.06% 15	186
Programs for Seniors (accessibility & relevance)	79.37% 150	11.64% 22	2.12% 4	6.88% 13	189
Getting News and Updates	78.84% 149	12.70% 24	3.17% 6	5.29% 10	189
Financial Stability of Organizations	79.47% 151	5.79% 11	2.63% 5	12.11% 23	190
Welcoming Office Space	63.16% 120	23.68% 45	2.11% 4	11.05% 21	190
Social Opportunities for Seniors	78.84% 149	11.64% 22	2.65% 5	6.88% 13	189
Organizations' Reputation/ Public Support	76.60% 144	12.77% 24	3.19% 6	7.45% 14	188



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Top 3 areas of potential positive impact (78% +)

- Financial stability of organizations
- Programs for Seniors
- Social opportunities for Seniors

Top 3 areas of potential negative impact (>8%)

- Clarity of Vision/ Mission/ Values
- Organization reputation/ public support
- Getting news & updates

We asked: Is the idea of these options a positive one for you?

	VERY POSITIVE	SOMEWHAT POSITIVE	NEUTRAL	SLIGHTLY POSITIVE	NOT AT ALL POSITIVE	UNSURE	TOTAL	WEIGHTED AVERAGE
▼ Status quo/no change	17.96% 30	16.17% 27	20.96% 35	3.59% 6	29.94% 50	11.38% 19	167	2.87
▼ Some shared services/ partial restructuring	33.14% 56	36.69% 62	4.73% 8	10.06% 17	8.88% 15	6.51% 11	169	3.80
▼ Full amalgamation/ merger of organizations	60.53% 115	17.37% 33	5.79% 11	2.63% 5	6.84% 13	6.84% 13	190	4.31

Funder & partner considerations

We asked: Are there any funding or partner implications (opportunities or threats) to shared services, partial restructuring or complete amalgamation/merger?

Considerations:

- Review funder agreements (TPAs) re. funding criteria and deliverables are still being met
- Ensure adequate planning
 - Bylaws for decision-making, membership, and purpose/mission
 - Strategic Planning - clear vision/ mission/ values/ objectives & goals
 - Governance model and organization chart
 - Budget and financial oversight plan



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- Communications planning
- Staffing plan with clear job descriptions
- Team building - building relationships and trust between organizations
- Consider using third-party for facilitation (no one organization to lead process)

Governance/ Bylaw/ Operational/ HR considerations

We asked: Are there any governance, bylaw, operational or HR implications (opportunities or threats) to shared services, partial restructuring or complete amalgamation/merger of these 3 organizations?

Considerations:

- New Society Bylaws would need a review to ensure compliance with Societies Act. These were redone last year to meet new requirements - should not be an issue.
- sharing a single governance structure
- fill three boards from the same pool of volunteers (that's getting harder)
- Alignment of mandates/ each org offers unique programs
 - Lifestyle and physical health
 - Social events and supports
 - Aging in place supports
 - advocacy
- Audience - all three organisations serve our senior (55+) population
- Review of staffing - possibilities for merging to full-time positions
- Potential of expansion of office/drop-in hours



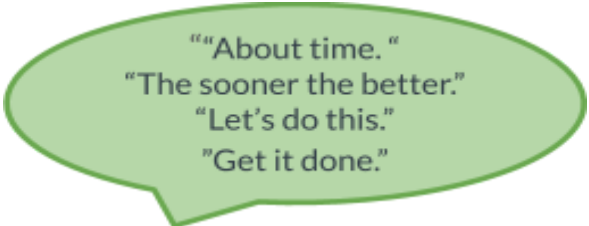
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Opportunities & Threats

Opportunities

We asked: What possible opportunities do you see for any or all of the following? status quo/ no change some shared services/ partial restructuring full amalgamation/merger of organizations?



“About time.”
“The sooner the better.”
“Let’s do this.”
“Get it done.”

Responses:

- Elimination of redundancy in what is offered.
- Better use of limited existing space for programs.
- Shared costs at a time of rapidly rising costs, reduced overhead, office expenses
- sharing of and more effective use of resources, reduction in costs,
- better communication to seniors of all opportunities/ supports available to them and where to access
- Consolidated, coordinated professional support staff
- Single membership
- prevent duplication and better coordination of programs, services and experiences
- user-friendly 'one-stop' location fits so many needs of seniors and elders.
- Clear representation of senior supports and services and voice to funders, government departments and agencies.
- Better public outreach to seniors, more streamlined, seniors could get more info that is relevant to them and their emerging needs
- Better insight from broader expertise
- Sharing information and resources
- Clarity on where to go and what is available for Senior services and activities
- louder voice in the community
- new org could actually start advocating on seniors issues rather than staying silent so as to not jeopardize funding.
- More comprehensive Aging in Place supports
- strong and experienced Board of Directors
- Decreased competition (volunteers, board members)

- Less burden on volunteer Board of Directors to run organizations
- desirable place for seniors to gather socially
- strong and visible group promoting senior interests
- I think that it is important for seniors to have a strong voice that can lobby for and help seniors to have good quality lives in all areas, and be able to get governments and others to listen and act on needs of elders - there is strength in numbers!
- Fresh ideas & new possibilities
 - Large Accessible Seniors Centre - opportunities for a new space more realistic
 - Larger space for social events
 - provide better services overall for all seniors and elders including participation of First Nations Elders, Filipino seniors, Seniors and Elders in the communities
 - Expanded partnerships with government agencies



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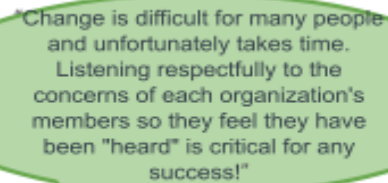
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Threats

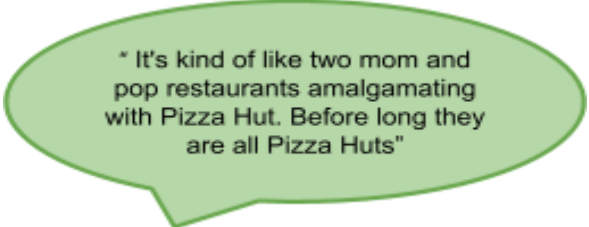
We asked: What possible threats do you see for any or all of the following? status quo/ no change some shared services/ partial restructuring full amalgamation/merger of organizations?

Responses:

- Biggest concerns -
 - Concerns about loss of funding
 - Loss of staff
 - Loss of identity/ representation/ independence
 - Loss of programs and services
 - Loss of key audiences (older seniors, seniors/elders outside of Whitehorse)
 - Not losing core of organizations (active, social, advocacy, info sharing)
- Privacy concerns
- Concern that some seniors may be unhappy with the change
- Change isn't easy
- Board (especially President) overload and burnout - consider Co-President role
- The space they currently have is too small. Need to sell that and search for new space.
- Burden of large organization
- Possible conflict or disagreement about priorities, power struggle, complicated decision making
- All eggs in one basket. Failure could lose all.
- Vulnerability to change of government funding
- Lack of support in the community



"Change is difficult for many people and unfortunately takes time. Listening respectfully to the concerns of each organization's members so they feel they have been "heard" is critical for any success!"



* It's kind of like two mom and pop restaurants amalgamating with Pizza Hut. Before long they are all Pizza Huts"

Final thoughts

Lack of immediate consensus

It's always a challenge for organizations to navigate differences of opinion. What we heard included a number of differing perceptions about potential impacts of no change versus amalgamation/merger. Eg.

No change is not an option. Amalgamate now.	VS	Seniors will be unhappy/ reluctant to change.
No amalgamation means that some organizations will go by the wayside	VS	Full amalgamation will result in lost funds and less staff.
One voice would have less influence than three voices in government/public	VS	Full amalgamation would give Seniors a much louder voice in the community.
Advocacy would be easier with one organization	VS	Advocacy would be worsened with full amalgamation

These kinds of opposing responses or concerns mean that clarification would be needed in future stages of the process and shared back to the members including:

- Sharing the what we heard
- Discussions with individual funders
- Discussions with other nonprofit collectives (re. Benefits of one voice vs. multiple voices)
- Clearly mapping out how the diverse voices within the organization and its membership will be honoured, shared and how decision-making will be made.
- Extensive planning work

Response - final thoughts...

“Yukoners are fortunate to have these wonderful services that offer opportunities for socialization, stimulation and friendship.”

“The sooner the better. Many of our seniors are already members of two or more senior groups.”



“Merging may be painful in the short-term but I think will be well worthwhile in the long run.”

Whatever option is decided on, the organizations are not going to please everyone. As indicated, there is not currently 100% support for any of the 3 options.

Ultimately, there is strong positive support for an amalgamation (75% of all responses) that is intentional and well planned to maximize on:

- Clear vision and a purpose/mission broad enough to not leave key priorities of any of the organizations behind.
- Affordable and accessible membership options.
- Continued programs and services for Seniors (also affordable and accessible)
- Strong clear communications with members.
- Clear benefits and celebration.
- Confirmation that key concerns have been addressed.
- A process that cause minimal disruption to existing programs and services.
- Excitement for possibilities (eg. Seniors Centre, new or expanded programs)

Next steps

- The Feasibility Study will be finalized and presented to the 3 Organizations and their memberships (as applicable) in May 2023. It will include:
 - Environmental scan - case studies from other organizations and their exploration of amalgamation.
 - 3 Senior Organizations outlines and considerations.
 - Best practices for amalgamation
 - Recommendations
 - Implementation framework for amalgamation
 - Outline of next steps for the 3 Senior Organizations.
- Further Organization discussions and decision-making (no pursue further)
- Additional member engagement



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