PEAK IMPACT

SIERRA Community HOUSE

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The Merger of Family Resource Center of Truckee | North Tahoe Family Resource Center | Tahoe SAFE Alliance | Project MANA

The Sierra Community House story offers an inspiring example of one community's vision to join forces to better serve families with a more seamless system of services.

November 2019

Life in a mountain town can be idyllic – stunning scenery, proximity to the natural environment, and an emphasis on healthy and active lifestyles. However, that does not mean people are immune to experiencing difficult times. In fact, families and individuals in North Tahoe-Truckee face a unique set of challenges within their rural, tourism-reliant region. For many, meeting their basic needs – food, housing, transportation, healthcare – is difficult because resources are scarce, and access to services is limited. Fortunately, momentum has been gaining across the United States to adopt a family-centered approach to improving well-being, the underlying philosophy being that the best place for children to grow up is in a family, and the most effective way to ensure children's safety and healthy long-term outcomes is to provide services that engage, involve, strengthen, and support families.[1]

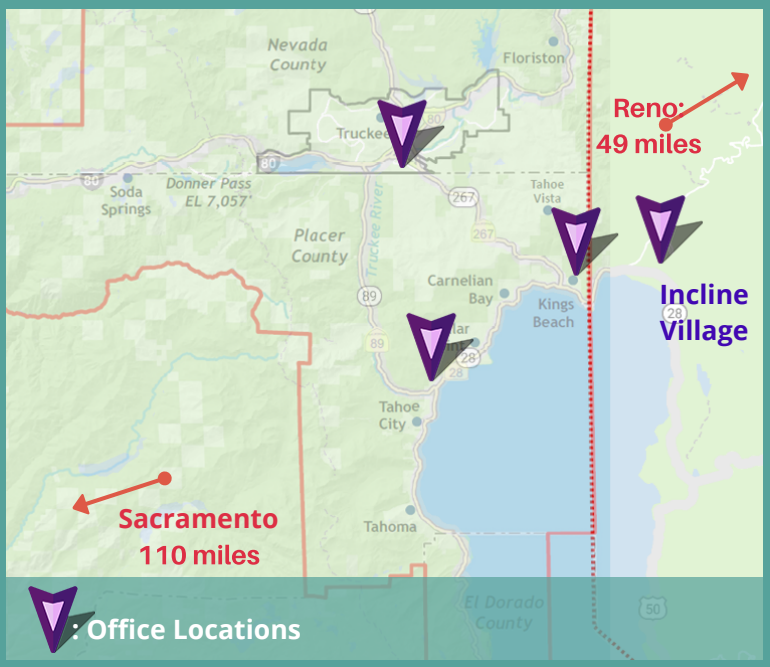
Unfortunately, many nonprofit organizations continue to operate in silos, even within the same community. Services are often fragmented, duplicative, or underused, frequently driven by funding sources and program eligibility guidelines rather than by the needs of children and families. [2]

However, in July 2019, four dedicated nonprofit executive directors, bolstered by committed board members, supportive funders, and experienced guides, surmounted these challenges with a merger that creates a comprehensive set of services for families in need in the North Tahoe-Truckee region of California and Nevada. The result of that merger is Sierra Community House.

THE TERRAIN

Nestled within the Sierra Nevada mountains, about a hundred miles east of Sacramento exists a region rich in complexity. Geographically isolated and straddling the California-Nevada border, the rural communities of the North Tahoe-Truckee area experience hundreds of inches of snowfall annually. Accessing many county-based services requires more than an hour's drive over mountain passes.[3] Wealth disparity is stark among the region's approximately 35,000 local residents. Vacationers[4] own most of the region's homes, and 65 percent of housing units are vacant most of the year. The year-round resident base survives in large part on seasonal tourism, which is largely comprised of minimum and low wage paying jobs. For many of these families, it is difficult to make ends meet. The Kings Beach community qualifies as a "poverty pocket," in which 40 percent of the population is at or below 150 percent of the federal poverty level.[5] Forty percent of the students in the Tahoe-Truckee Unified School District qualify for the free or reduced price school lunch program. [6]

Here, residents in need face steep transportation barriers to accessing critical services. Beyond rural isolation and severe weather conditions, challenges include seasonal spikes in visitors, infrastructure constraints, limited funds to implement infrastructure improvements, and congested roadways for those travelling in and out of the Lake Tahoe Basin.[7] Additionally, the region has a high cost of living that exceeds the national average, with some areas experiencing housing costs more than 300 percent of the national average. Within that landscape, many neighborhoods have a median income of $35,000, and up to 35 percent of those families are living in poverty.[8]



The systemic pressures of poverty include a lack of social support, financial struggles, unsafe living conditions, domestic and sexual violence, child abuse and more, creating an environment of chronic stress for both children and adults.[9] For many North Tahoe-Truckee residents, having access to family-strengthening services is critical. Local nonprofit organizations working to meet these needs must navigate the abovementioned geographic and economic challenges, as well as a jurisdictional maze of two states, four counties, and several municipalities that convolutes access to government funding and adds a thick layer of regulatory requirements on service delivery.

Fortunately, those who live and work in North Tahoe-Truckee are deeply interconnected because of the community's small size. Many of the same individuals have been volunteers, clients, and staff for two or more of the merging organizations, a factor that played an incalculable role in Sierra Community House coming to fruition.

"We joke that every five years, we get up and move one chair to the right. In this region, professional options are limited, the number of agencies serving the area are few, and people love to live in this community, so, inevitably many of us end up working in many of the local organizations over time. This practice is really beneficial because people understand the perspectives of the different agencies and are deeply connected to all of them, and this perspective provides empathy and connectivity that would be difficult in a larger community."

Phebe Bell, director of the Behavioral Health Department of Nevada County, former director of the Community Collaborative of Tahoe Truckee, former director of Tahoe Women's Services, and former Project MANA volunteer

THE HIKERS

Tahoe SAFE Alliance

Founded in 1983 by volunteers and incorporated in 1985, Tahoe SAFE Alliance provided direct services to victims of intimate partner/domestic violence, sexual violence, and child abuse. The agency maintained three office sites and the region's only safe house. Paul Bancroft served as executive director from November 2016 to June 2019.

Project MANA

Project MANA, founded in 1989 by a local Sierra Nevada College student who fed the local community out of her garage, eventually expanded across three counties in the region. The organization's mission was to reduce the incidence of hunger and its detrimental effects upon individuals, families, the community, and the region. Deidre Ledford served as executive director from February 2017 to June 2019.

North Tahoe Family Resource Center

The North Tahoe Family Resource Center (NTFRC) was first established in 1991, under the name La Comunidad Unida, for families and individuals seeking resources. In 2001, the organization became the Kings Beach Family Resource Center, then finally the North Tahoe Family Resource Center in 2007 to more accurately reflect its service to the Greater North Tahoe and West Shore communities. Amy Kelly served as executive director from 2012 to 2018. Upon her retirement, Anibal Cordoba Sosa served as NTFRC's executive director from July 2018 to June 2019.

Family Resource Center of Truckee

The Family Resource Center of Truckee was conceived in August 2001 to promote social and economic success by providing education, mobilizing resources, and advocating for change on behalf of Truckee's underserved families and individuals. Teresa Crimmens served as executive director from April 2015 to June 2019.

CLEARING THE PATH

The Sierra Community House merger was, in fact, the result of over fifteen years of community collaboration, and there were a number of actions taken that can be considered milestones along the journey. Conversations between the two Family Resource Centers about merging surfaced periodically over the years. There was support from the S.H. Cowell Foundation to merge, but readiness was an issue. A combination of timing, leadership, and funding factors prevented the initial merge.

However, the collaborations remained strong, significantly supported by the Community Collaborative of Tahoe Truckee (CCTT). The CCTT is a 25-year partnership of 45 nonprofit organizations and public agencies working together to address the fundamental needs of families in the region; CCTT became a program of the Tahoe Truckee Community Foundation in 2008. Collectively, the CCTT identifies emerging community issues and develops comprehensive strategies with its combined vision and resources. The CCTT served as convener and provided an avenue for the exchange of ideas and coordination among the four organizations' leadership. The space provided by the CCTT allowed leaders and staff to build relationships, improve partnerships, and foster collaboration in the region. The CCTT provided invaluable support for the organizations that merged into Sierra Community House.

CLEARING THE PATH

In 2012, the Tahoe Truckee Community Foundation led the planning, construction, and implementation of Community House, a physical space that created an environment conducive to integrated service provision. Tahoe SAFE Alliance, the NTFRC and Project MANA began offering services in the shared Community House space in 2014; shortly thereafter, the Family Resource Center of Truckee started offering legal assistance out of the space, as well. One of the first clear steps towards consolidation was the early hiring of an integrated services coordinator to increase community member awareness of the services and coordinate the integration of services when an individual or family was engaged with two or more of the of the programs offered by the NTFRC, Tahoe SAFE Alliance, and Project MANA. This co-location provided a proof of concept that service integration was possible.

"Community House in Kings Beach took a notion that people had thought about for a long time and made it concrete. Once you could go there and see the evidence, see how it worked, I think it became easier to recognize and understand it was better for both clients and staff. In that sense, I think, once Community House came to be, the Sierra Community House merger became almost inevitable."

Ken Doane, executive vice president and chief program officer, S.H. Cowell Foundation

PRE-MERGER SNAPSHOT

	Tahoe SAFE Alliance	Project MANA	N.Tahoe Family Resource Center	Family Resource Center of Truckee
Year Formed	1985	1989	1990*	1999**
Annual Budget	$2,200,000	$400,000	$600,000	$600,000
# of Full-Time Staff	26	4	8	9.5
# Community Members Served FY 17-18	800	2,100	1,500	1,500

*Founded as La Counidad Unida, then became NTFRC in 2006

**Incorporated in 2008

After a few years of co-location, in 2017, the executive directors embarked on a theory of change process that provided clarity around the purpose of Community House and became a driver in looking in earnest at how the organizations could take their collaborative relationship to the next level. The culmination of that effort led directly into the process of strategic restructuring, which La Piana Consulting defines as two or more organizations coming together in pursuit of a shared goal, with the end result being a structural change or the creation of a new entity.

THE TRAIL GUIDES

Strategic restructuring requires a great deal of time and energy, often with much of the load falling on already extremely busy executive leaders. The process of moving from readiness assessment, to negotiation, to implementation and post-merger integration can be daunting and requires turning decisions into action at each step of the way.[10]

Beyond the time and effort required by board and staff, trust and relationship building are key ingredients to success. The restructuring process is replete with ambiguity and unknowns and, to a certain extent, a leap of faith and relinquishing a certain amount of control is required by all parties.

Sierra Community House, like many successful mergers, had helpers to navigate these complexities. Alison Schwedner, Director of the CCTT, played a key role in connecting and fostering relationships among the four organizations. La Piana Consulting provided expertise in planning and facilitating the strategic restructuring process.

Alison served in the region's nonprofit sector for over twenty years and had worked at both Tahoe SAFE Alliance and NTFRC before joining the Tahoe Truckee Community Foundation in 2008. Her deep relationships with community members and knowledge of both the community's needs and service providers allowed her to facilitate informal merger conversations when opportunities presented themselves. Alison had been involved in merger conversations between Teresa and Amy, the two executive directors of the Family Resource Centers. She was then approached by Tahoe SAFE Alliance's executive director Paul Bancroft, who wanted to initiate a conversation about merging not only the two Family Resource Centers but also Project MANA and Tahoe SAFE Alliance after the theory of change exercise. Alison convened the four executive directors to gauge interest.

The commitment to exploring a deeper collaboration was clear from the very first meeting. After receiving blessings from their boards, the executive directors began engaging their staff in conversations centers on bringing the organizations together. They also continued to meet weekly, with Alison as facilitator. La Piana Consulting entered the picture in April 2018 to facilitate the strategic restructuring process. The firm led the four organizations through the assessment, negotiations, and implementation planning phases, which set the stage for successful integration.

THE HIKE

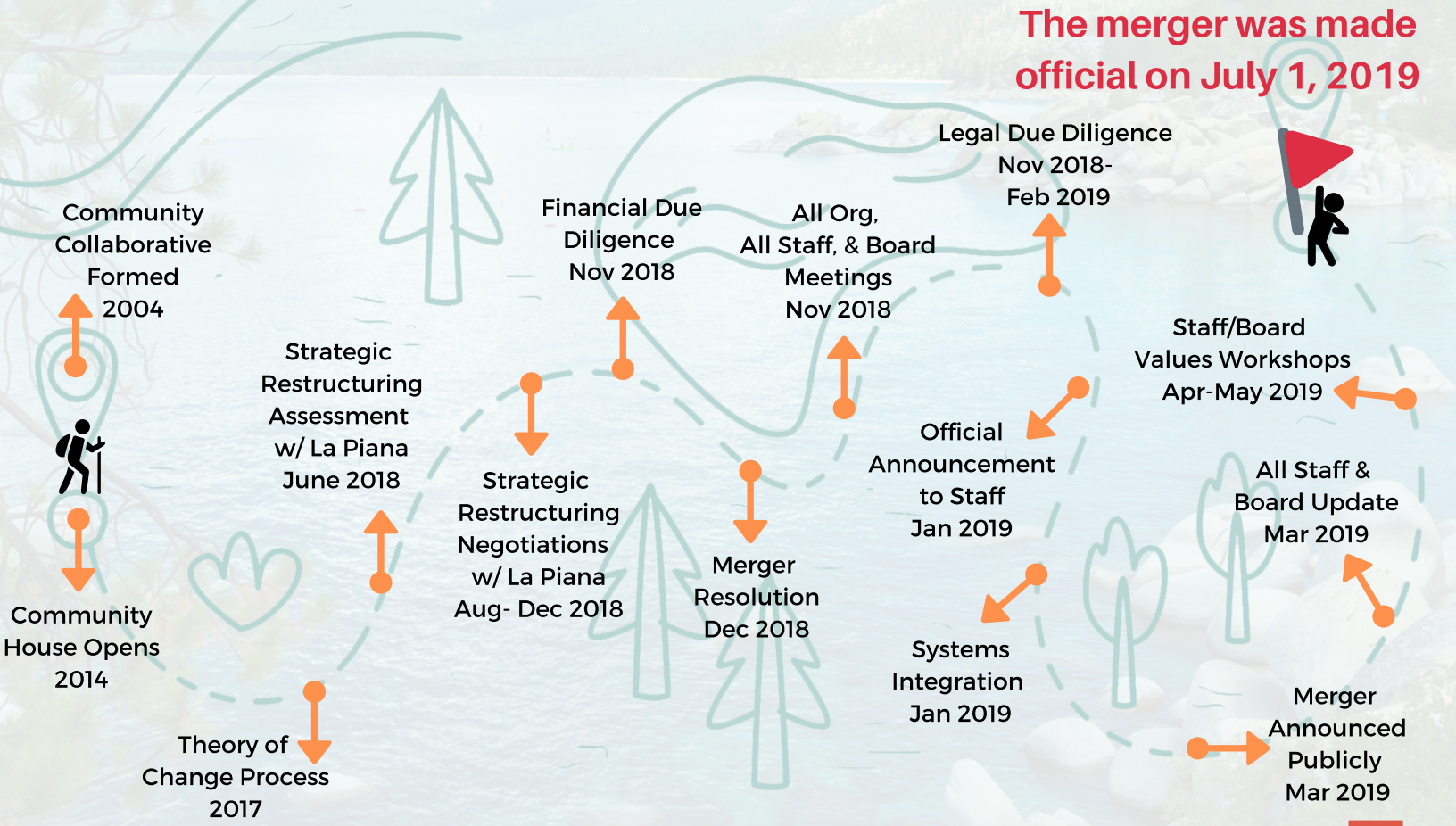
In June 2018, the four organizations reviewed La Piana Consulting's assessment to better understand the success factors and challenges associated with various forms of restructuring and to gauge organizational readiness to undertake negotiations.

Following the assessment, a series of negotiations sessions were held from August to December 2018 to consider and resolve all the issues that must be addressed in a merger. This included financial due diligence by La Piana Consulting, a process undertaken to consider the financial position and recent performance of each organization, and to gain a greater understanding of the financial implications of a potential merger. After completion of financial due diligence in November 2018, legal due diligence, an independent examination of the legal ramifications of a potential partnership, was conducted pro bono by an attorney from November 2018 to February 2019.

In December 2018, all four boards passed merger resolutions. Systems integration commenced in January 2019. Cultural integration events were held before and after the merger was announced publicly in March 2019.

Paul Bancroft, former executive director of Tahoe SAFE Alliance, was hired to serve as executive director of the merged organization. It is worth noting that under normal circumstances, the selection of an executive director can be a difficult process and at times impedes merger exploration beyond the assessment phase. In this case, the three other executive directors did not desire the position and instead were satisfied with assuming other key leadership roles within the merged organization. Furthermore, all staff from the four organizations were retained and re-hired by the merged organization.

The merger was made official on July 1, 2019



STEEP INCLINES

Although the four parties involved agreed that the process of assessing their readiness for strategic restructuring, negotiating an agreement, and merger implementation was, for the most part, smooth and seamless, there were a few notable challenges that can serve as lessons for other organizations considering a similar effort.

Cultural Considerations

Organizational culture can make or break a merger. Although a cultural integration committee was formed as an intentional component of the merger process, and cultural integration was and continues to be a consideration in most discussions, the issue of cultural differences at both board and staff levels still proved to be sticky to navigate. It is often the case that the larger organization in a merger tends to dominate culturally by the simple fact of having a greater number of staff. In the case of Sierra Community House, Tahoe SAFE Alliance was substantially larger than the other three organizations. Some board and staff members from the other three organizations naturally experienced some amount of stress about losing the ability to respond quickly to community needs and the potential for losing their more familiar ways of relating to one another. Also critical is the integration of the different philosophical frameworks of the merging organizations. With Sierra Community House, there were two Family Resource Centers rooted in family, neighborhood, and community strengthening, coming together with a domestic violence/sexual assault organization, deeply focused on ameliorating the negative impacts of power and control, physical, emotional, and sexual violence, and a hunger relief organization, centered around food insecurity and distribution. Bringing these different frameworks together requires grace, patience, and intentionality during integration and beyond.

Additionally, due to varying levels of funding requirements and compliance, there was concern that organizations with a history of more flexible funding sources would not integrate well with stricter requirements.

In deeper conversations among the negotiations committee, it was discovered that the organizations were far more similar than different. It was also important to center the idea that the merger was about creating a new, fifth organization and that it was not to become a larger version of one of the existing organizations. One board member suggested that, had time been available, conducting more comprehensive organizational culture surveys for both staff and board would have helped to gain greater understanding at the outset of what differences may (or may not) exist.



Whether through informal conversations or a more inclusive survey, it is important to unpack cultural differences early in the process to proactively address and mitigate potential cultural barriers to integration where possible.

STEEP INCLINES

Merger Launch Lift

Although much preparation work had been completed as part the negotiation phase, staff leading the merger process expressed difficulty with the volume of work required at launch time.

"Overall, we were going at this very leisurely pace - working through big picture things in a methodical, paced out way. All of a sudden, when consolidation hit, it felt like we were scrambling with last minute implementation tasks. I wonder if there could have been some way to make this stage as methodical as everything else."

Elizabeth Balmin, director of Mediation and Legal Assistance, Sierra Community House

During legal due diligence, it was decided to merge the entities simultaneously versus staggering them. This resulted in a very heavy lift for Human Resources which included creating a new salary and benefits structure, developing new job descriptions and onboarding nearly 40 people prior to July 1, 2019. This was difficult on both a systems level and for staff carrying out the work, not to mention for affected staff who may not have had time to ask questions to better understand the necessity of the process and how they may be impacted by the new terms of employment.

In hindsight, a project manager might have eased the burden on the four executive directors throughout the post-merger integration process and particularly during the fast-paced early days of the launch. However, the work of an integration team often falls on staff, as hiring dedicated support it can be cost-prohibitive for many organizations.[11] Another consideration would be rethinking the July 1 start date. The integration of four accounting systems while simultaneously trying to close out the year is a tremendous amount of work for already overwhelmed staff.



VIEW FROM THE SUMMIT

Sierra Community House is now a hub for families in crisis.
Clients are already recognizing the ways in which the merger will benefit the community.

Ten years ago, I was a victim of domestic violence. When I filed a police report, I was pointed by the sheriff to Tahoe SAFE Alliance for help. At the time, I had a five-year-old daughter to support; I needed to continue to work while feeling broken inside. People around me were judgmental. Therapy [provided by the organization] helped me deal with the situation, and I felt safe and listened to. A couple of years later, Tahoe SAFE Alliance staff referred me to the North Tahoe Family Resource Center for legal assistance with immigration. It was difficult to transfer my case between the organizations. The merger is going to be really good for the community and make it easier for clients to get help.

Anonymous Client

When I came to Tahoe SAFE Alliance, I was desperate for help. I have received services from both Tahoe SAFE Alliance and Project MANA. They are the reason I'm still on my feet. When you're in crisis, the last thing you want to do is fill out double paperwork. The merger will make it easier to receive services.

Anonymous Client

VIEW FROM THE SUMMIT

As the previous quotes demonstrate, many of the former individual organizations served the same clients. There are enormous benefits to be gained, by both the clients and Sierra Community House, from providing a continuum of services to individuals and families that none of the former organizations would have been able to provide independently.

By providing a seamless system of services, Sierra Community House hopes to address the needs of the whole individual or family, serve the most vulnerable community members, and support better outcomes for clients over the long term.

Through consolidation, Sierra Community House hopes to reduce confusion regarding service access, ensure that no client slips through the cracks, and eliminate the need for clients to spend valuable time and emotional energy re-telling their story and enrolling in multiple programs. Creating a new organization provides opportunities to build an organizational culture that best serves the needs of both the clients and the organization. Bringing these four organizations together unites multiple frameworks in an effort to prevent interpersonal violence, hunger, child abuse and family stress. By expanding service delivery while viewed through the lens the 5 Protective Factors, being trauma informed and community-centered, the larger organization has more tools to have a greater impact.[12]

In addition to benefits for clients and the community, Sierra Community House anticipates a number of internal gains as a result of the merger, including increased promotional power to raise community awareness of services available, operational and service integration efficiencies, and better positioning to leverage funding across state and county lines. Economies of scale and administrative efficiencies made possible by the merger include the potential for better quality control and compliance oversight, increased talent recruitment and retention capabilities, more robust professional development and training opportunities for staff, and greater investment in board recruitment, retention, and development. Lastly, a larger and more sustainable organization may position Sierra Community House for larger-scale investment by funders and create greater capacity to take on special initiatives to serve the community.

"Smaller organizations don't have much of a promotion ladder, and we lost staff to the school district because they provide better opportunities for bettering one's position.. Sierra Community House will allow us to be more competitive to attract and retain good people."

– Gordon Shaw, Current Sierra Community House board member and former NTFRC board treasurer

ON THE HORIZON

"(The merger) helps community members get services faster. We were able to get a community member help from programs to crisis intervention in about three minutes, and it felt great!"

– Sierra Community House staff member

"We are having conversations about how the Promotora and Close to Home programs can collaborate, which will improve community education and prevention in the Latinx community and increase program reach."

– Anne Rarick, Community Education & Outreach Organizer

With the merger implemented just a few months ago, it is too early to measure impact and outcomes, although all evidence suggests the future holds great promise for Sierra Community House and the communities it serves.

For more information and to follow the organization's progress, visit. www.sierracommunityhouse.org.

SIERRA Community HOUSE

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We would like to appreciate our facilitators and the Negotiations Team for their passion and commitment to Sierra Community House:

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