



Centraide
of Greater Montreal

**MUTUALIZATION
AN INTRODUCTION TO
THE BASICS**

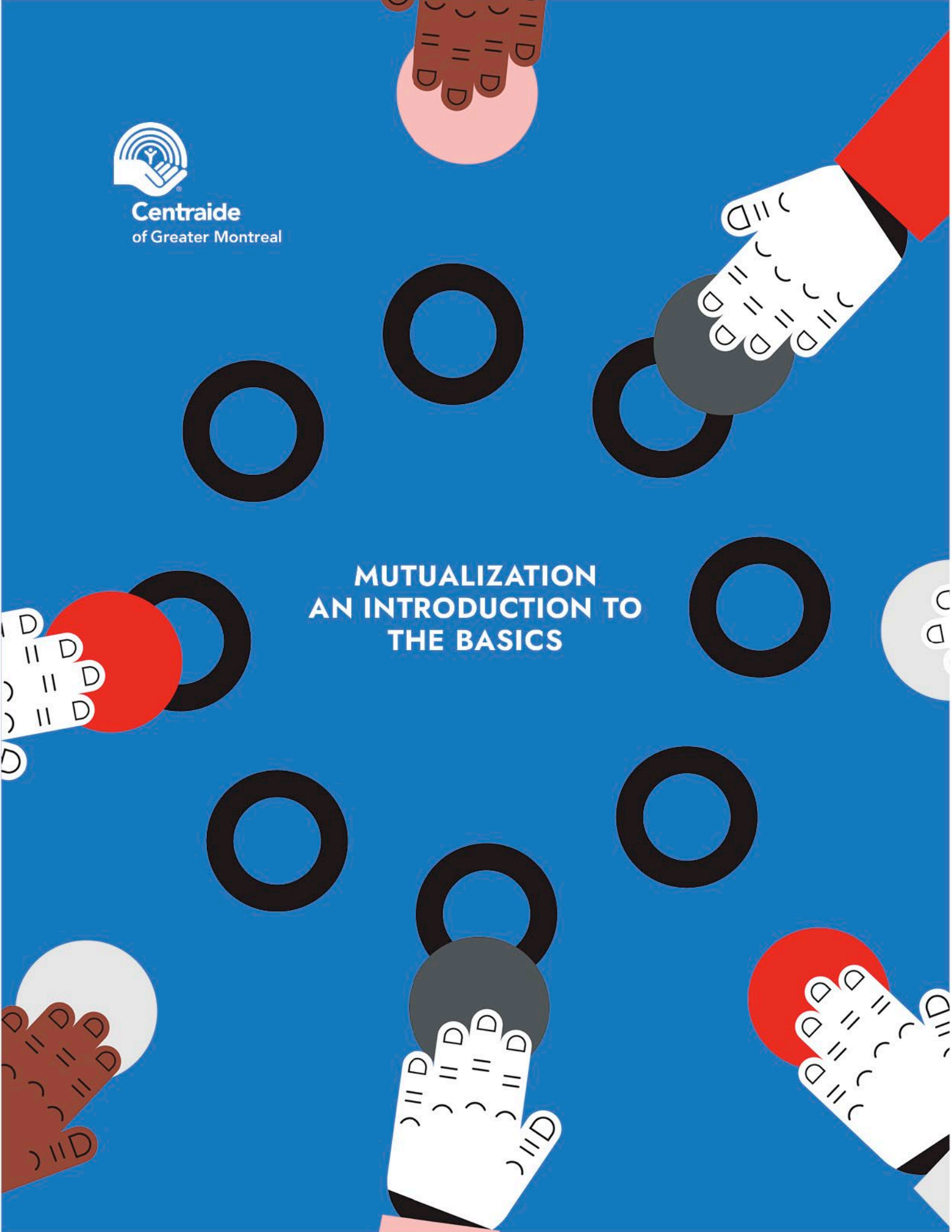


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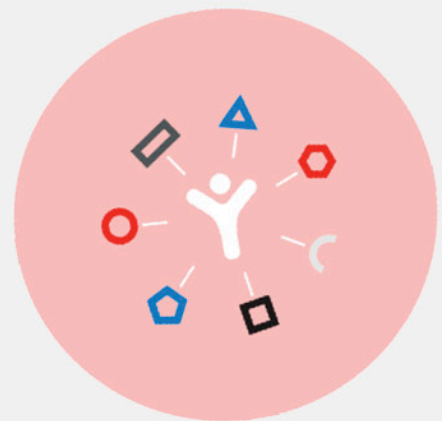
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Introduction and background | Mutualization

What is mutualization? The term has become quite popular over the past few years. Mutualization is a series of collaborative practices we already apply in community organizations, whether intuitively, under a different name or without a name for it.

This case study doesn't provide a recipe for mutualization. Rather, it aims to clarify the main ideas at the heart of this approach to cooperation and resource distribution, and some of the related concepts.

In this document, we'll explain some key concepts of mutualization before looking at the often necessary steps. We'll discuss the required reflection, analyses, planning and implementation stages to carry out a project that is aligned with the circumstances of the organization and its field of activity. Finally, we've included resources and links to take the conversation further and help move the mutualization project forward.





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KEY CONCEPTS IN MUTUALIZATION

Introduction and background

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Key concepts in mutualization

What is mutualization?

Simply put, mutualization is the "act of mutualizing," but let's take a deeper look. Mutualization implies distributing, sharing, pooling "something." The idea is that a number of people will be involved in mutualizing the something and it will be *mutually* beneficial.

What can be shared, distributed, pooled or mutualized?

- Premises, equipment, physical resources, vehicles
- Employees, a leadership position, board members, volunteers
- Skills, knowledge, data, time
- A vision, a mission component, services
- A specific project, an event, an ad campaign, a fundraising event, suppliers, purchases
- A territory, a client base, contacts, a network
- Any many other things



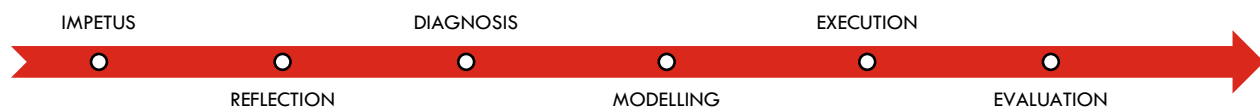
Who should participate?

In theory, mutualization can happen with any person, organization or institution of your choosing. It will depend on you, your goals, your means, and your comfort level with the organizational juggling required. In all cases, it's important to remember that working with others means:

- You are not alone
- The other people are probably different from you
- They'll do things differently
- They'll understand things differently
- You'll need time to get to know each other and determine how best to interact
- You'll need time to make decisions and get things done together

Important steps when considering mutualization

Every mutualization project is unique, but there are some common key steps.



1. Impetus

Why consider mutualization? Why undertake this type of project? These are valid questions, especially because the reasons for mutualization can vary from one person to the next, and from one organization to another. To avoid reasons that are too radically different and misunderstandings, it's a good idea to take some time and reflect on this point.

Possible reasons for mutualization:

- Mission-related reasons:
 - > Renew/diversify approaches, programs or activities in collaboration with other organizations
- Financial reasons:
 - > Acquire a partner's expertise or resources
 - > Enhance activities by gaining access to greater operational capacity
 - > Save on operating costs
- Strategic or political reasons:
 - > Have a bigger impact in your sector
 - > Expand your reach within a territory
 - > Have a stronger voice with policy-makers
- Philosophical reasons:
 - > Reinforce the values of the organization and its partners

- > Serve as a model of collaboration in your sector
- Organizational reasons:
 - > Increase the resilience of otherwise isolated organizations or individuals, decrease isolation
 - > Share the work and responsibilities with others

“If you want to go fast, go alone. If you want to go far, go together.”
African proverb

2. Reflection

A mutualization project often involves several parties who know each other in varying degrees. It's therefore important to take the time to get to know the other organization, as well as your own. You should be able to answer the following questions: Who am I? Who is the other organization?


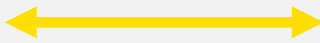
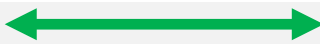
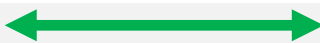
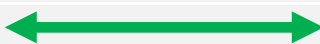
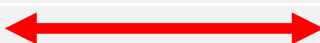
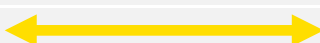
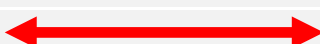
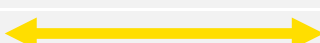
As you think about it, you will find that an organization's identity is complex. A self-analysis grid can be a useful way to cover all the aspects of identity. It should include the following:

- Mission, values
- Members, participants
- Facilities and equipment
- Activities, services
- Reach, impact
- Mediation
- Communications
- Administration, governance
- Other important features

In a mutualization project, the goal is to identify the core of each organization, its strengths and weaknesses, what each organization has to offer and what they need. The points listed above could of course be more detailed.

3. Diagnosis

Once you've carried out an analysis of the other parties involved, you should consider where you are complementary and where mutualization could work. It could be all aspects of an organization or just some. The following table is an example of how to map your diagnosis of possible mutualization areas.

MY ORGANIZATION	DIAGNOSIS	THE OTHER ORGANIZATION
Mission, values		Mission, values
Members, participants		Members, participants
Facilities and equipment		Facilities and equipment
Activities, services		Activities, services
Reach, impact		Reach, impact
Mediation		Mediation
Communications		Communications
Administration, governance		Administration, governance
Other important features		Other important features

Green arrow = Complementarity, potential synergy

Yellow arrow = Complementarity, but significant differences exist that need to be further discussed

Red arrow = Significant obstacles or challenges

4. Modelling

Modelling the mutualization project is the **design phase**. It touches upon two specific aspects. First, the “US” needs to be defined to create the mutualized identity. Then, the “HOW” needs to be defined, including how the project will be carried out.

Defining the “US”

The “US” is the equivalent of an organization’s mission. It defines the reason for mutualization and its main aspects. The “US” is the **common** identity as opposed to each partner’s individual identity.

The “US” can be determined by answering the following questions:

- Who will we be together?
- Who will we serve together?
- What will be our common focus areas?

Some answers to these questions might be:

- Together, WE will have the capacity to collect and distribute food throughout our territory.
- Together, WE will be a stronger, more attractive employer.
- Together, WE will be a one-stop-shop offering multiple services to users in our community.

Determining the “HOW”

The “HOW” determines the scope of the collaboration among the participating organizations. At this point, you need to identify what will be shared and how. For example, will be exchanges and sharing always be symmetrical or equal? As different organizations don’t necessarily have the same means, their ability to contribute may not be the same.

In any case, during this step you won’t just determine what will be shared. You’ll also need to agree on the duration and form of the sharing and each party’s responsibilities. In other words, you need to formalize the mutualization agreement. Depending on the level of complexity, this agreement may take one of the following forms:

- Legal agreement (if a new organization will be created)
- Service agreement (for exchanges of very specific items)
- Collaboration protocol (e.g., for ad hoc or time-limited exchanges and projects)
- Handshake (for simple exchanges)

When defining the “HOW,” you also need to consider **consultation and decision-making processes**. Consultation can be limited to a small committee or include all the parties involved in the mutualization project. **Decision-making methods must also be defined**, both for the preliminary stages of the mutualization process and for day-to-day operations once the project is launched.

5. Execution

The execution of the mutualization projects has two essential components: planning and implementation.

Planning

As a rule, the more complex the mutualization project and the more stakeholders involved, the more rigorous the planning process should be. Having **common tools** is essential to channel each party's intentions toward shared goals. The good news is that the parameters and methods usually used in strategic planning—which many managers are already familiar with—can be used in this process.

The following elements would generally be found in a “strategic plan” resulting from such an exercise:

- A summary of the vision and values (the “US”)
- Areas of action (e.g., services, communications, management, member relations)
- Main orientations and the related strategies

The strategic planning will focus on the mutualization and not on each organization's activities. Basically, at the end of the planning process, you should be able to answer the following question for each aspect of the mutualization project:

- What do we want to accomplish together and how will we go about it?

Implementation

To implement the project, you'll be using a tool which is an extension of the strategic plan: the action plan. The action plan goes back to the elements of the strategic plan and describes the actions, means and resources needed to carry them out. Most of the time, an action plan is presented in table form, with the following elements:

- Orientations (e.g. share a space, pool resources, launch a common initiative)
- Strategies (e.g., improve, engage, offer)
- Concrete actions (e.g. document, write, bring together, acquire, rent)
- Timelines (month, year, depending on the context)
- Names or titles of the person responsible or owner of each action
- Goals (e.g. number, percentage)
- Other conditions for implementation (e.g. funding, dedicated resources, board approval)

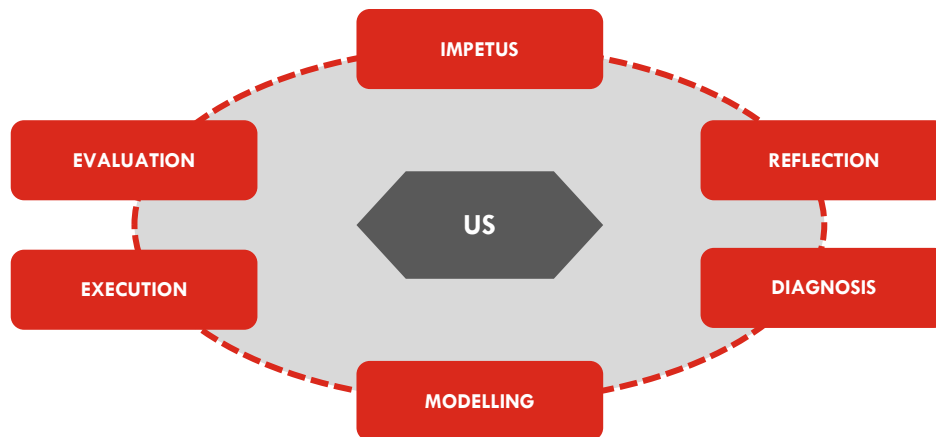
An action plan is at once a planning tool and an administrative tool. It enables the parties involved to follow up as needed.

6. Evaluation

Regular evaluation of progress is critical in order to identify possible improvements. An evaluation enables you to:

- Identify what's working and what isn't
- Determine if goals have been reached or not
- Determine the actual impacts of the actions and any unforeseen consequences
- Understand and correct issues

In a linear model, issues are assessed and corrected at the end of a project. However, they generally occur at all phases of a project. The process is, in fact, iterative, meaning there is feedback between the different stages. Evaluation should therefore be conducted on an ongoing basis so that improvements can be made over the course of the project. Each step should set the stage for the next one and inform the "US" that is at the heart of mutualization effort.



Winning conditions

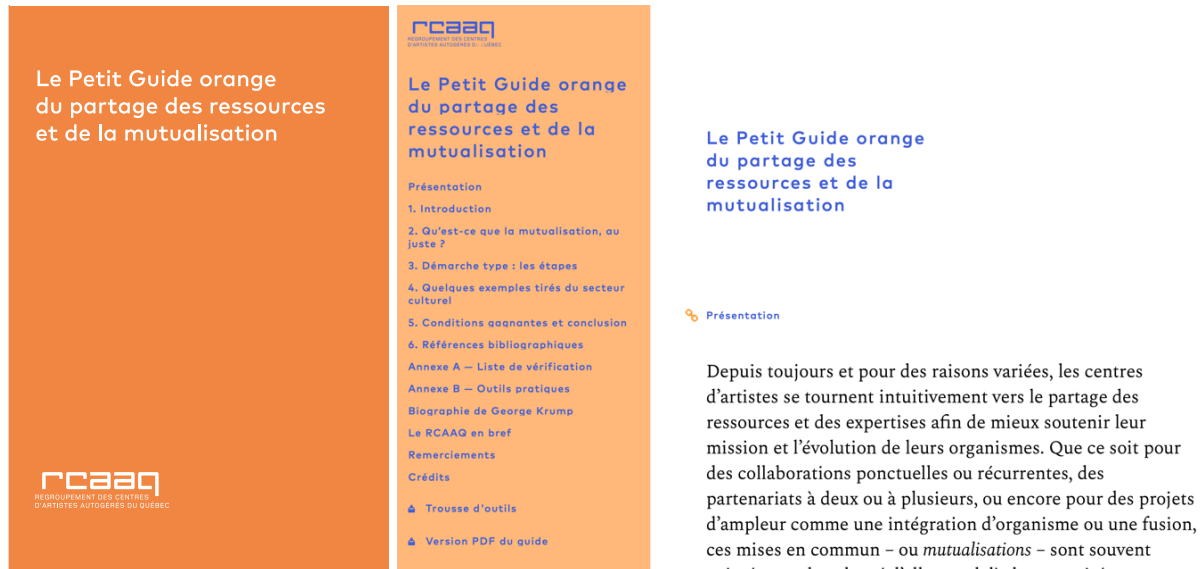
Mutualization is a process whose complexity varies depending on the project's objective and scope. Individuals and organizations have been collaborating and cooperating since time immemorial. And they have had misunderstandings, conflicts and breakdowns since the dawn of time. Following the steps described in this case study will not guarantee success but it can help identify and avoid some pitfalls. To increase your chances of success, remember the following:

- The desire at the outset to work together and smooth over differences is a good predictor of success. While an unwanted mutualization project is not impossible, it will require more effort in order to find common benefits.
- Transparent communication between the parties is necessary at every stage. Language can be an obstacle and words may not be interpreted in the same way, so you must always make sure everyone is on the same page.
- Mutualization is not the end goal. It is a means for improving your capacity to act and achieving your mission and mandate.
- Finally, mutualization is not a pre-defined model that is equally suitable for all organizations. Each individual and organization must invent the model that is best for them at that specific time.

References

For more information, please refer to the *Petit Guide orange du partage des ressources et de la mutualisation*. While it was produced for self-managed artist centres, it is useful for other sectors of activity, including community organizations.

<http://petitguidemutualisation.rcaaq.org/>



The guide also contains practical tools that can be useful for some of the steps and can easily be adapted to the agencies and sectors served by Centraide.



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PRESENTATION OF THE STUDY CASE



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STUDY CASE PATRO VILLERAY

Presentation of the case

Patro Villeray, a recreation and support centre, was born in 2020 from the merger of the Centre de Loisirs communautaire Lajeunesse and the Patro le Prévost. It is a complete mutualization process since it led to the disappearance of two organizations to make way for a new legal entity with a different identity. If we had to situate the “merger” on a scale that presents the different types of mutualization by degree of integration, it would be qualified as the most extreme.

Presentation of the organizations involved

At the root of this process, there were two independent community organizations, working in the Villeray—Saint-Michel—Parc-Extension borough, who shared similar missions. Before presenting the events that led to the mutualization process, let’s find out more about the organizations involved.

Patro le Prévost

Created in 1909, Patro Le Prévost (PLP) was one of the largest and oldest community and recreation centres in Quebec. Its mission was to promote the well-being, development and dignity of people. Based on respect, unity, openness and support, the organization was first a foundation set up by a religious association before it became a charitable organization in 1969. At the time of the merger, PLP had a team of approximately 120 permanent employees and numerous volunteers. PLP offered services to more than 2,000 people in its facilities located at 7355 Christophe-Colomb in Montreal, housing, among other things, a swimming pool, gymnasiums and a catering service.

Centre de Loisirs communautaire Lajeunesse

The Centre de loisirs communautaires Lajeunesse (CLCL) was a non-profit organization created in 1989 and located at 7378 rue Lajeunesse in Montreal. Its mission was to create a living environment by offering all citizens accessible and innovative recreation activities focused on personal development and by promoting synergy between local organizations and partners. Its creation was the result of the desire of many NPOs in the neighbourhood to share resources by renting a former school from the Commission scolaire de Montréal (CSDM). The Centre was able to welcome eight other NPOs operating in different sectors under the roof of this vast building. In addition to offering

services and activities to the community, the CLCL also rented premises, meeting rooms and conference rooms to nearly 300 external organizations.

Impetus for the process

In 2017, the CSDM informed the CLCL of its intention to resume the use of its building at the beginning of 2020 due to a lack of space in neighbouring primary schools. All of a sudden, nine NPOs and their 220,000 users were faced with the loss of the premises they were using. This announcement forced the CLCL to consider various relocation possibilities if it wanted to continue to play its role within the community. The Villeray–Saint-Michel–Parc-Extension borough, a tenant of the building, worked with the organizations concerned to find solutions to relocate them properly.

Main steps

As soon as the takeover of the building was announced, the team and the board of directors of the CLCL began an in-depth study of the various possibilities for relocating its activities. After meeting with various partners, the CLCL and Patro le Prévost agreed that it would be beneficial for the neighbourhood to merge the two organizations. Espace Stratégies, a strategy consulting firm, was hired in July 2019 to assist the two organizations in the design of a new entity inspired by both of them. The first step was to carry out a comparative analysis of the two organizational structures to assess their compatibility. Through interviews and a survey of employees of both organizations, the consultants were able to identify issues and challenges in four areas:

- Vision, values and issues
- Organizational structure
- Governance and labour relations
- Change management

A portrait of similarities and differences has led to the following diagnosis:

“Two organizations with similar profiles, but with different internal challenges. Reconciliation is possible.”

The consultants then examined comparable structures in Quebec and elsewhere in Canada to identify inspiring practices and other mergers of community centres. This comparative analysis was based on the four areas mentioned above.

For the next step, two workshops were held with people representing both organizations. The first workshop made it possible to move ahead with the reflection on the common values, the overall vision and the most important issues. The second workshop focused on defining the organizational model to be designed. Two models were then submitted for discussion for purposes of comparison and to determine the advantages and disadvantages of the proposed scenarios: the cohabitation model of the two organizations and that of a new “super” organization. The latter was ultimately chosen.

The consulting firm then produced a report in which four pillars for the development of the new organizational model were set out:

- Maintain affiliation with the Patro movement while remaining a secular organization
- Insofar as possible, preserve the jobs for PLP and the CLCL
- Take into account the fact that the employees of PLP are unionized, but not those of the CLCL
- Increase and diversify the current service offer

The consultants also proposed a breakdown into four major time points for the implementation of the rest of the process:

- Conciliation of the boards of directors
- Definition of organizational identity
- Implementation of organizational identity
- Moving

For each step, planning and implementation had to take into account the following four guiding principles:

- Governance
- Organizational culture
- Service offer
- Teams

Implementation of the merger

At the end of the summer of 2019, the two organizations each voted a resolution expressing their intention to create a new organization offering recreation, support and community action services in Villeray. Even if the legal particularities remained to be clarified, the creation of the new organization was to be carried out according to the following principle:

“A merger through the co-creation of a new organization where the two organizations pool their activities, their resources and their respective heritage to transform themselves into a new and single organization in order to increase and diversify the service offer for recreation, support and community action for the benefit of the community.”¹

To this end, another consulting firm, Laboratoire Conseil, was recruited in November 2019 to support the CLCL and PLP in the implementation of the merger process. A proxy committee — i.e. a steering committee — was immediately created to coordinate the actions of the stakeholders. Made up of the management of the two organizations, two directors from the two organizations, two representatives of the Villeray—Saint-Michel—Parc-Extension borough and the director of the Patro foundation, the mandate was to monitor the implementation process to avoid blind spots, while ensuring that there is constant two-way communication between the process’s operational team and the boards of directors of the two organizations. The operational team was the select committee comprising the management of the two organizations and representatives of the consulting firm responsible for supporting the stakeholders.

Implementation steps

Since the merger of two organizations is a complex process requiring careful planning and rigorous implementation, the process was divided into three phases, which were to span over 12 months, from the beginning of November 2019 to the end of October 2020. In the end, the phases partially overlapped and the process was fully completed a little later, at the beginning of 2021.

¹ Translation of an excerpt from a resolution voted on December 3, 2019, by the board of directors of PLP.

Phase 1, called the “operational merger”, was intended to better frame the merger process to maintain the mobilization of the boards of directors and the teams of the two organizations. It was also about analyzing and validating the use of the premises for the relocation of the CLCL to the PLP facilities. Crucially, the impact of the merger on the staff of the two organizations needed to be assessed, the management model defined as well as the type of leadership and the structure of this new organization. To this end, consultation with different staff categories was conducted and a legal opinion was sought to measure the scope and impact of the collective agreements on CLCL employees and on the new merged organization. Finally, it was also necessary to carry out a complete audit of the two organizations in anticipation of their merger to ensure that no hidden financial or legal issue would hinder the process.

Phase 2, targeting the technical and communication aspects of the merger, made it possible to tackle four aspects. The aim was to specify the governance structure and methods before legally constituting the new organization. Two options were still on the table at this time:

- Creation of a new legal entity through the ordinary merger of PLP and the CLCL, as provided for by the Registraire des entreprises du Québec
- The unification of the two organizations by the predominance of one of the two entities: in this case, the preservation of the legal entity of Patro Le Prévost and the voluntary dissolution of the Centre de loisirs communautaires Lajeunesse.

The first option, considered to be more faithful to the spirit of the merger approach desired by the parties, is the one that was chosen. At the same time, work aimed at clarifying the identity framework of the new organization (mission, vision, values) as well as planning and organizing communications for the continued operations of the merged organizations were carried out.

A crucial step related to the merger was the choice of the name of the new organization. Although it was decided that the organization would remain a Patro, it was necessary to adopt a name that could mobilize all the members to create a feeling of belonging. A consultation with PLP and the CLCL members, partners, volunteers and other Patros was carried out. It was proposed to choose between the name “Patro Villeray”, the name “Patro Lajeunesse” or to make other proposals. The 328 participants finally opted for the name Patro Villeray with a majority of 57.05%.

Phase 3 focused on the launch of the programming for the activities of the new entity, Patro Villeray, and the finalization of the merger process. The operational details of the new entity needed to be specified, i.e. the reception, the registrations, the surveillance, etc. A common service offer in line with the pillars of the two organizations but with added value resulting from the pooling of the strengths of each also needed to be created. This led to the planning of an initial program of activities for the fall of 2020. Finally, once the legal incorporation procedure had begun, the assets of the two merged organizations had to be alienated and transferred to the new entity.

Completion of key milestones

From April to June 2020, the merger project went through a very significant stage of realization. In the midst of the first wave of COVID-19, the teams started layout work to develop and improve the spaces that would accommodate the employees of the two community centres as well as those of the other partner organizations who would follow the CLCL to PLP. The move took place in this sometimes chaotic context, but was completed in time for the launch of the fall activities.

On July 21, 2020, the CLCL and PLP respectively held a special general meeting so that the members of each could adopt a resolution for an application for letters patent of merger. The application included the list of the ten members of the provisional board of directors of the new organization, composed of an equal number of directors from PLP and the CLCL.

In early August 2021, an agreement was signed between PLP and the Union (CSN) of Patro Le Prévost employees concerning the procedures for integrating the CLCL employees into the seniority list, the employment offer for the fall 2020 and the allocation of open positions as part of the planned merger.

As for the first programming of Patro Villeray, it was put online on August 17, 2020. In terms of human resources and programming, PLP and the CLCL were practically already a single organization at the beginning of the fall, even before they received the letters patent of merger.

It was finally on January 1, 2021, that Patro Villeray, a recreation and support centre, was legally constituted, that the members of the provisional board of directors officially became the directors of this new organization and that the Centre de loisirs communautaires Lajeunesse as well as Patro le Prévost were formally revoked.

Lessons

Each mutualization process is unique, but lessons are sometimes transferable to other similar projects.

- Need to consult staff at all stages of the process to consult, inform, reassure.
- Plan internal and external communication actions, even if all the parameters of the planned project are not known. The walls are not watertight and the message gets muddled easily, which fuels the anxiety of other stakeholders.
- Usefulness of drawing inspiration from best practices or comparable organizations, if applicable, to avoid reinventing the wheel.
- Importance of rigorously planning the transformation of organizations and foreseeing the possible impacts on all parts of the chain involved.

Components that were mutualized

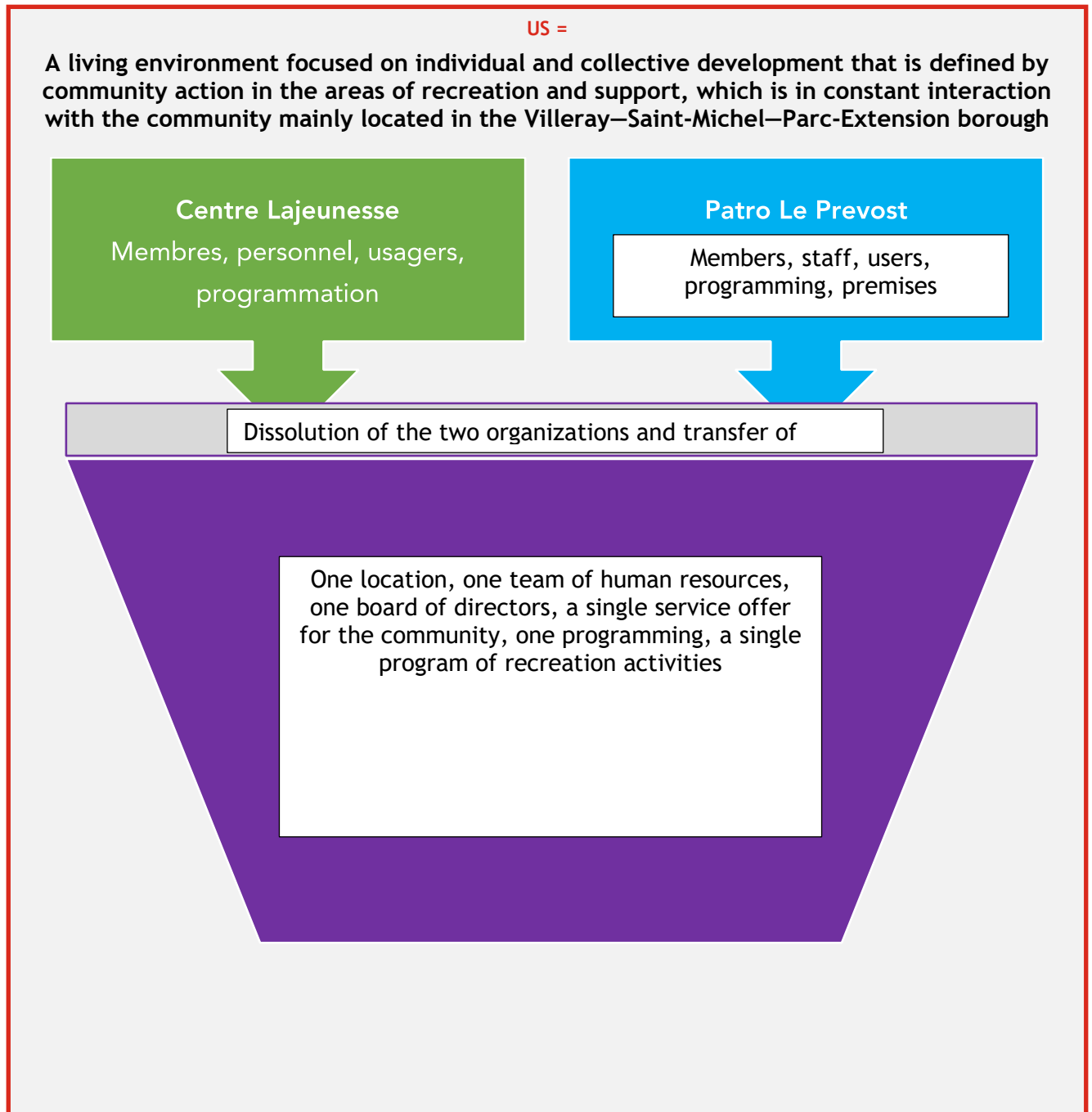
As part of the merger process, virtually everything about the identity of the two organizations was mutualized.

- Premises
- Human resources
- Members of the boards of directors
- Services offered to the community of the Villeray—Saint-Michel—Parc-Extension borough
- Programming of recreation activities

Conversely, certain items that now allow the new organization, Patro Villeray, to emerge and distinguish itself needed to be remodeled:

- Name
- Visual identity
- Governance structure

Diagram of this mutualization model





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**STUDY CASE
ALPABEM-CAFGRAF**

Presentation of the case

ALPABEM and CAFGRAF are two organizations that work in the field of mental health in Laval. Following the departure of a key human resource in one of the organizations, namely the general manager of CAFGRAF, actions were launched to bring the two organizations closer, while maintaining the singularity of their respective missions and preserving their separate legal status.

Presentation of the organizations involved

ALPABEM

Created in 1983, the mission of the Association Lavalloise de parents et amis pour le bien-être mental (ALPABEM) is to support the people close to a person presenting clinical manifestations related to a major mental health disorder, by offering them a range of services aimed at informing, helping and equipping them for a better quality of life.

CAFGRAF

CAFGRAF was created in 1994. Its mission is to bring together adults and young adults experiencing mental health problems, homelessness, addictions and psychosocial adjustment issues in a place of belonging, to offer assistance, mutual aid and support services aimed at self-fulfillment, autonomy and recovery.

Impetus for the process

In 2021, following the departure of the person in charge of the general management of CAFGRAF, the organization's board of directors contacted Patrice Machabée, then general manager of ALPABEM, to gauge his interest in leading the two organizations. This was the starting point for a reflection aimed at assessing the feasibility of this pooling of a crucial resource. Considering the magnitude of the task, it was quickly decided that other integration actions were required to establish the winning conditions for this new collaboration. Another factor that served as an accelerator to the reflection is the fact that CAFGRAF's rent was very expensive. The possibility of staying there for the long term despite major rental improvements also seemed highly improbable and undesirable.

Main steps

Reflection on two distinct aspects initially guided the different stages of this process. On the one hand, the complexity of the normal duties of general management has raised questions about how to run two organizations with two separate teams working in facilities just over 2 km apart. This general management also had to report to two separate boards of directors and to meetings of members with very different profiles. This level of reflection was therefore focused in part on a search for efficiency and also on stabilizing the workforce.

On the other hand, the reflection was also focused on the very nature of the missions, the sector of activity and the clientele of each of the organizations, within the same territory. The possibility of being able to provide a “better offer” together was highlighted as a goal to be achieved, without conceptualizing the form that this increased collaboration could take.

From 2021, joint meetings of the boards of directors of the two organizations were held with to create a common dialogue. Different formulas were tested to find a balance between the needs of management and those of the board of directors, while preserving the independence of the two legal entities.

Even if Patrice Machabée is a manager who has defended the virtues of mutualization for a long time on various fronts, he requested external expertise to help him tackle the follow-up of the reflection and future actions. Consultant researcher George Krump, author of these fact sheets, was called upon to examine the work accomplished and pave the way for other convergence opportunities for staff members and the board of directors.

To this end, a training and reflection workshop on mutualization opportunities with approximately thirty staff members and members of the boards of directors of the two organizations was organized in February 2022. The meeting had several objectives:

- Demystify what lies behind the concept of mutualization and establish the foundations of a common language within the two organizations.
- Understand how each of the organizations works by getting the team members to talk about their own organization, their job, the mental health community and the territory of Laval, as well as the people they work with on a daily basis.
- Highlight the “key strengths” and the “needs” of each organization to begin finding natural avenues for collaboration between the organizations.

Through discussions, the other main objective of the day was to lead the people of these two different organizations, which hardly ever rub shoulders, to get to know each other and to gradually glimpse the potential of increased collaboration. These exercises also revealed a strong complementarity and a high potential for synergies between the two organizations.

The weeks that followed led to discussions and working sessions with the boards of directors, the general manager and members of his close team. Three possible mutualization scenarios were envisioned, with the intention of submitting them first to the two boards of directors, then to the members at the annual general meetings in June 2022:

- Option 1: consolidation of the status quo, i.e. maintaining shared general management and a few “hybrid” employees, who share their time between the two organizations.
- Option 2: pooling all the services and staff of the two organizations in the ALPABEM building, on two different floors, with separate entrances to maintain client confidentiality. The second floor which would house CAFGRAF would have to be built.
- Option 3: Similar to Option 2 but adding the creation of a third-party organization that would provide human resource management and most administrative services for both legal entities.

The presentation of these scenarios with the boards of directors clearly suggested that option 2 was preferable. Although the three scenarios were going to be presented at the general meetings, the boards of directors wanted to communicate their recommendations.

At each of the meetings — June 14, 2022, for ALPABEM and June 15, 2022, for CAFGRAF — the research consultant presented the main stages of the process and the three scenarios. It was established from the outset that what was sought was not a *carte blanche*, but a resolution authorizing the boards of directors and general management to continue exploring and formalizing the chosen scenario in order to plan its implementation if conditions remain favourable. Significant time was allocated to discuss the advantages and disadvantages and to express the fears and hopes triggered by this process. Having been reassured that other consultation periods were planned for later, option 2 received the approval of the vast majority of those present.

Since cohabitation in the same building was central to the chosen scenario, management undertook to validate the financial feasibility of a preliminary construction project with some of its partners. The outlook being positive, the project could move on to the next stage.

In January 2023, the two organizations jointly held an ambitious three-day strategy session, organized and led by consultants from Vectis groupe-conseil and another guest presenter, André Fortin. The objective was to lay the foundations for strategic planning of the mutualization project while clarifying several fundamental elements at the heart of the initiative, e.g. common vision and values. A real opportunity to get to the bottom of things, the project entitled “Transition vers l’avenir” (transition towards the future) was also intended to clarify the identity of this organizational model still under development, as well as common intentions and actions.

The consultant had first read the recommendations of the previous consultant researcher, then conducted interviews and workshops with staff and discussed with a dozen people identified as internal or external stakeholders in one or both organizations. The analysis of the results of these consultations was presented during the strategy session to provide food for thought from the first day.

Several of the reflection or ideation exercises during the first two days were based on the following statement, which today represents the new common mission of the two organizations:

Bring together in one place the resources and expertise of the two organizations to meet all the needs of people aged 16 and over suffering from a mental health problem, and those around them.

The third day was an opportunity to define a few priorities and essential actions for the future. Subsequently, the consultant and management undertook to record the main orientations, strategies and actions in a strategic plan and its action plan which were still in the development phase at the time of writing this fact sheet.

Components to be mutualized

Based on work that is still underway, the following are among the components that are likely to be mutualized:

- General management
- Strategic meetings involving the two boards of directors
- Certain administrative services, including payroll and human resource management
- Certain communications resources
- A building bringing together the two organizations (planned)
 - > Separate spaces for user services to preserve confidentiality (on two floors with separate entrances)
 - > Shared spaces for staff and for hosting events related to the organizations' field of activity

Expected results

Although the process is still far from being completed, we may still present some of the expected results of this mutualization project:

- Possible continuum of services for people with mental health problems
- Improved workforce retention due to the ability to rotate or progress within both organizations
- Better working conditions for staff
- Savings on space costs
- Pooling of know-how, more training opportunities

Lessons

Considering the nature of the organizations and the disciplinary field of mental health, certain findings have emerged clearly during the process stages implemented to date.

- Pay attention to the feeling of loss, especially for vulnerable clientele for whom the organization, its location, its advisers are elements of stability.
- Constantly involving employees in the process, even for seemingly superficial steps such as deciding on the colour of walls, common areas, etc. gives staff the feeling of not losing control.

Next steps

Some of the next phases of implementation will be tinged with a great deal of timing uncertainty, particularly anything that depends on the progress of construction, layout and relocation of CAFGRAF. Here are some known steps.

- Approval of the chosen mutualization scenario and outline of the strategic plan during the general meetings of June 2023
- Construction of a second floor in the building (date unknown)
- Relocation of CAFGRAF and integration of the teams in the new spaces (date unknown)

It should be noted this fact sheet will be updated as the mutualization project progresses.

Diagram of the mutualization model envisioned

