



THREE INTO ONE DOES GO

Age Concern Auckland together with Age Concern Counties Manukau and Age Concern North Shore

BACKGROUND

The history of applications and grants relating to various mergers of Age Concern groups goes as far back as 2015 when Age Concern New Zealand (ACNZ) worked with Age Concern groups around the country considering a single, unified organisation. This did not proceed. Subsequently various applications were made which led to a regional unifying of Age Concern Auckland (ACAk), Age Concern Counties-Manukau, and Age Concern North Shore. While not all their applications to the Working Together More Fund (WTMF) were successful, the three remained focused and committed to the vision of a unified service. Included in the “mix” of grants approved, for other than for the merger, were initiatives to develop wider collaboration among Auckland and Northland Age Concerns and a governance hui.

Grants for the merger were staged and began with a 2017 grant of \$11,440 to support research and consultation, per-

sonnel costs of those working on the project, travel, administration, HR and legal advice as well as various other costs incurred in the consultation process.

THE PROCESS

Following this an agreement to merge and appoint a CEO-designate was reached and ratified by all three organisations, with the new CEO, Kevin Lamb, being appointed and taking up the position on 1 July 2019. Kevin’s key role at that point was to lead the transition process.

The merger aimed to make the three organisational structures more effective and efficient in their delivery of services, allowing for a greater focus on client and community needs and to better align strategically with external stakeholders. Overall, Kevin said “the initiative is well positioned to meet the growing needs of the target audience, both today and in the future.”



ACHIEVEMENTS

The success of the process was, in part, due to the establishment of a Transition Board, consisting of representatives of all three Age Concerns, and the collaborative approach taken by the three respective CEOs. They had developed a high degree of trust and transparency, enabling their discussions to proceed effectively.

While united “at the top” they realised the vitally important need to engage with staff, volunteers and members of their respective organisations. Kevin noted “great emphasis was placed on frequent, informal updates being provided, leading to a formal process of consultation.” The leaders ensured that a consistent message was given within the same broad timeframe.

WHAT WAS LEARNT?

While the process worked extremely well, there were challenges. For example, board members involved, being voluntary, were not always available when needed. A consequence was “an inevitable slowing of the overall process.”

This grant helped develop a strong basis on which to proceed. The emphasis on maintaining effective communications was an important component. This ensured that any cultural differences between the three organisations were respected and did not allow the process to lose its effectiveness. Using an independent facilitator was “invaluable” Kevin said. “It clearly separated any one Age Concern being seen as overly driving the project.”

They were then ready to make the transition and early in 2019 a grant of \$17,500 was made to assist with costs of professional advice. Kevin describes the amalgamation as “an immense undertaking” and excellent advice was required. Communication remained key and it was important to keep everyone engaged and informed, as some preferred there be no change. Also critical reviews of services, processes, communication strategies etc were undertaken, extending the benefits of amalgamation. Kevin noted “The amalgamation will have far greater reach than simply operational efficiencies and will assist Age Concern Auckland in enhancing our capacity, capability and efficiencies for years to come.”

At the beginning of 2020 a third grant was approved by WTMF to ensure the successful “wrap up” of the transition. A grant of \$15,000 was approved to support the new organisation set up a new, unified phone system, a unified SharePoint IT system and related training.

Kevin concludes by noting “Having undergone the process, we have already been asked to advise other clusters of Age Concerns across New Zealand on the benefits of amalgamation and how to undergo the process itself. We have been only too happy to share our experiences widely.”

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