

Charity Commission

Collaborative Working & Mergers



Commission Policy & Charity Law



- Encourage trustees to think of imaginative ways to do more and better for beneficiaries.
- Not the role of the Commission to push charities into collaborative working or merger.
- The Commission will help to facilitate from the legal perspective once the trustees have made the decision to proceed.
- Advice may need to be sought from the Commission if trustees are unsure about object compatibility.

What's the Difference?



- Collaborative Working:
Charities working together to fulfil their purposes whilst remaining separate organisations.
- Mergers:
Two or more separate charities coming together to form one organisation.

Role of Trustees



- The trustees of charities are responsible for the decisions about collaboration or merger.
- Trustees may take advice or consult with stakeholders, funders, beneficiaries and staff to inform their decisions.
- Trustees may also wish to take professional advice when making decisions about collaboration or merger.

Collaboration - Give me some ideas!



Charities can collaborate through:

- sharing equipment/office space e.g. 'hot desk'
- sharing vehicle purchase/lease e.g. minibus
- sharing back office functions e.g. HR, finance
- joint IT projects/building projects
- joint training events
- shared service delivery
- consortium bidding for projects/large contracts

Collaboration or Merger - Top Tips



- Do your homework - find out about your partners (Due Diligence)
- Communication - make sure you have a plan!
- Project plan - manage the process
- Take your time - set realistic targets and review progress

Recent Publications from the Commission



- Collaborative Working and Merger Checklists
- Mergers Pack

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