

Merging for Impact

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Let's imagine you have a small but solid youth serving agency with a highly successful program. Your board and staff leadership are competent and energetic. Your goal is to reach a greater number and more diverse range of young people with the agency's service. But without the critical mass to enable the organization to take that next big step, your goal does not seem feasible.

How are you going to deliver your program's impact on the broad scale you envision? If you are the Alberta Mentor Foundation for Youth (AMFY), you begin to look outside yourself to determine if another group in the community could help you attain your goal.

Now let's suppose you have a well-known, longstanding mentoring agency. Your programs are growing and diversifying rapidly. You have an impressive organizational vision to spur on a community-wide mentoring movement. However, you lack a significant presence in the surrounding communities and have limited programming for older youth.

What should you do to take the next leap in creating that culture of mentoring you know is possible? If you are Big Brothers and Big Sisters of Calgary and Area (BBBS), you know that building strong connections with other organizations must be a strategic priority in order to make your vision real.

A variety of strategic options existed for AMFY and BBBS. A project based partnership and a shared service agreement were just two possibilities on the table for

these organizations. But the leaders of both agencies knew that in order to have the big community impact they were envisioning they had to be open to significant change. With unshakeable commitment to their community's young people bolstering their courage, AMFY and BBBS dared to contemplate what some consider the unthinkable ... merger.

Done for the right reasons, and with due diligence and careful planning, a merger is one strategy that can help multiply a nonprofit's impact.

Like AMFY and BBBS, many nonprofits today - perhaps yours included - are willing to consider or even actively pursue a merger. But you may be treading lightly, unsure of the path to take and concerned about obstacles that may lie ahead.

On the other hand, you might be less than enthusiastic about amalgamations. Perhaps your skepticism is fueled by accounts of mergers that failed to deliver the promised results. Maybe you question the motives of funders who actively encourage nonprofit "consolidation". Or it could be that your concerns are about possible job losses, fears of losing the organization's unique identity, or clashes of organizational cultures.

Regardless of whether you are pro- or anti-merger, it is important to recognize that nonprofit mergers are inherently neither good nor bad. Rather, merger is simply one strategic option among many that your organization can pursue to achieve specific goals. Like any poorly designed and implemented strategy, disappointment and failure

can result if the merger is not done well. But done for the right reasons, and with due diligence and careful planning, a merger is one strategy that can help multiply a nonprofit's impact.

AMFY and BBBS, with their strong organizational foundations, common program goals and a grander vision for the community, were well positioned to undertake a merger. Their successes - and their mistakes - have motivated them to help others along this path.

What has resulted is the following series of quick and easy resources meant to inspire and guide you in thinking about merger as a strategic option for your organization. Read one or read them all! Whether you are just wondering how to begin a conversation about merger, or whether your organization is already set to launch an integration plan, these articles will help you take the next step.

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How Does a Merger Happen?

The AMFY – BBBS Merger Story

How would two nonprofit organizations arrive at the idea to merge? How would they make the decision to merge? And what must they do to actually combine the organizations into one? Nonprofit mergers, being relatively uncommon, tend to evoke these kinds of questions. The answers are not clear-cut, however, as each merger is unique. Different mergers happen for different reasons, and follow varying processes and timelines. So rather than offering a prescription for how a merger should occur, the following case story provides one inspiring example of the evolution of a nonprofit merger.

In the Beginning ...

For years the Alberta Mentor Foundation for Youth (AMFY) and Big Brothers and Big Sisters of Calgary and Area (BBBS) had peacefully co-existed, each reputable organization running its solid, growing programs.

AMFY offered a school-based mentoring program for junior and senior high students. They had expanded their successful service into communities surrounding Calgary, and were working on reaching more diverse groups of young people and volunteers.

BBBS had a growing menu of mentoring programs, including the community-based Big Brothers and Sisters program, as well as Couples for Kids, Between Generations (seniors matched with elementary students), Teen Mentoring (high school students mentor elementary students), Recreation Mentoring (matches take place at recreation facilities), and an In School Mentoring program for elementary students.

The two agencies had a cooperative relationship and came together periodically to collaborate on small scale projects and discuss common issues. But they had never taken the step to work more closely and formally together, perhaps because of the clear distinctions between the groups they served, or maybe due to leadership styles, personalities or other pressing priorities.

Seeing the Future

By 2007, change was afoot. AMFY, as part of its annual

strategic planning process, created a new vision. “Our new vision, ‘Inspired youth, inspired community,’ had a much stronger external focus,” recalls former AMFY Executive Director, Donna Rubenstein. “It was less about the program and organization, and more about the youth and the community. The program was only one tool or vehicle to serve the youth and achieve the vision ... The program was established and successful, but the limitations of our size and the strategy we had weren’t going to get us to serve thousands of youth and other parts of Canada. And so we asked ourselves what transformational change we would need to get there. It was then we began to look at working with various youth-serving agencies in a variety of ways.”

Rubenstein goes on to explain, “The core model was great, but how we delivered it had to change because the world around us had changed. When our thinking shifted from being organization focused to being focused on the prize – the grander vision – an openness to radical transformation occurred.”

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BBBS, meanwhile, had also been working toward a grander vision as part of its strategic plan. Their plan, aptly subtitled, “It’s all about the children and youth,” was founded on a belief in the power of

mentoring, and a commitment to do whatever is necessary to create a large scale mentoring movement.

“Collaboration was central to our plan for creating a culture of mentoring,” Executive Director, Sharon Moore, remembers. “And although we initially had no intention to merge with AMFY, part of our strategy for that year was to find ways to work more closely with them.”

Moore recalls, “When Donna [Rubenstein] came on board, she had a spirit of collaboration. We shared a common vision of working collaboratively to move mentoring forward. We worked from the same value base and goals. We spent time building a trusting relationship, and this helped us to move to the next level.”

Once a trusting relationship was in place, together with a clear vision that their primary mission was to serve youth - not to serve their respective organizations - new opportunities began to arise.

One such opportunity occurred when AMFY staff recognized strong potential for a BBBS Teen Mentoring type of program in the outlying communities in which AMFY had a strong presence. Rather than reinvent the wheel, they approached BBBS late in 2007 and talked about different ways to deliver such a program together, such as a small project based partnership or shared staff.

Although these collaborative options had possibilities, they also

had complexities. And as Rubenstein and Moore examined the current partnership opportunity in conjunction with their bigger vision for mentoring, merger began to stand out as another clear option.

Raising the Topic

“It was Donna [Rubenstein] who suggested that we take this to our boards with a recommendation to move it all under one organization – under BBBS,” recalls Moore. In December 2007 AMFY proposed that a meeting be held with three board members and the Executive Directors from each organization to explore their common ground. BBBS enthusiastically accepted the invitation, having also recognized the many potential benefits of combining forces. When The Calgary Foundation was informed of these developments, they were quick to offer financial support for the discussions.

The Calgary Foundation hosted that first meeting, which was facilitated by a skilled, neutral third party. “The first meeting was not so much about facts and details, but more about principles, values, vision and where each organization was headed,” reports Rubenstein. “People quickly saw there was a lot of common ground and that we had something solid to go forward. They could see the “prize”, the potential synergies and long term opportunities.”

Although the board members’ openness to the merger discussion might seem rapid to an outside observer, both Rubenstein and Moore emphasize that this readiness had incubated for months and even years. Through each organization’s ongoing strategic planning processes, goal setting and visioning exercises, the boards were already well aware of the need for transformational action.

Furthermore, BBBS had been formed through a merger of three organizations over thirteen years earlier and therefore had positive

merger experiences and associations to draw on.

Resistance to merger was slightly more evident at AMFY, where many of the board members were also the agency’s founders with strong emotional ties to the organization. Rubenstein notes that it was important in her role to ensure that the board remained focused on serving the youth versus serving the organization. “The idea of joining, for us, was to transform the impact we had, because AMFY was taking only one little slice, and really we were limited in what we could do. The goal was to multiply the impact we had,” she emphasizes. She adds that having the right people championing the merger discussion was critical to generating support and enthusiasm.

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Excitement resulted from this first meeting in early January 2008, but it was clear the merger was not a done deal. “Our first discussions were exploratory,” remembers Moore. “We took the time to ask ourselves important questions, and we walked away with a lot of tasks to do. We needed to get funding in place, create an initial memorandum of understanding, and hire the right people to get us through the next steps.”

By the end of January 2008, many of these initial tasks had already been accomplished. The quick pace of action was driven not only by eagerness to realize the potential of the merger, but also by the need to have a fully functioning youth mentoring program in place for the start of the school year in August.

A “Design Team” was formed, comprised of those who attended the first joint meeting. Both boards agreed that the Team’s mandate was to move forward in pursuit of merging the AMFY program with

BBBS. The Design Team crafted a high level memorandum of understanding to get the process going, hired a project manager with experience both in mergers and in mentoring organizations, contracted a communications consultant, secured several sources of funding, and confidentially informed staff of the new direction.

Getting Down to Business

A first key step in getting the work of the merger underway was to develop a unification planning process – a map outlining the path that would be taken to arrive at an integration plan. To create this map, the project manager worked with the Executive Directors to clarify intentions, assumptions about roles, and goals related to the merger. Together they also articulated the principles that would guide the merger discussions and decisions. “Establishing the principles up front guided everything ... So many things could have gone off track, but we kept coming back to the founding principles, like a charter of rights,” reflects Rubenstein.

The unification planning process also outlined the major steps to be taken in planning the merger, a timeline for accomplishing the major milestones, and a process for reporting progress and recommendations. Working groups were identified, along with key questions and issues for each working group to address. The Design Team heartily approved this roadmap by late January 2008.

Late January also saw the development of a preliminary communication plan with the assistance of the communication consultant. The plan defined who needed what information about the merger, it identified key messages to be used by staff and volunteers, and it outlined an implementation plan for communicating with all stakeholders. Rubenstein recalls the importance of this plan, “The communication plan was critical,

especially in the first month. It helped us to address many key issues, and to focus externally on who was the priority.”

The working groups, consisting of key staff and volunteers, got underway in early February 2008. Each of seven working groups had an area of focus, including: program; governance/legal; human resources; partnerships/affiliations; financial/funding; facilities/equipment/technology; and, marketing/communications.

Each working group was responsible for researching, negotiating and developing a detailed integration plan for its area of focus. The integration plan identified recommended outcomes, outlined the specific tasks required to reach those goals, and assigned responsibility and timelines for the tasks. The working groups’ recommendations and progress were tracked by the project manager and reported to the Design Team at its bi-weekly meetings.

By late April 2008 the working groups had completed the major features of their plans, which were compiled into a consolidated integration plan. A legal unification agreement was then developed, in which the boards of the organizations indicated their support for the integration plan’s guiding principles and key elements. The signing of this agreement at the end of April signaled the merger was now a certainty - a cause for celebration!

Bringing it All Together

But celebration soon gave way to the acceleration of work on integration tasks. Many substantial goals had to be achieved in a short span of time. For example, a lease buyout had to be negotiated on AMFY’s office space, and the BBBS office had to be completely renovated to accommodate most staff in one location. AMFY volunteers, young people and schools had to be informed of the

implications the merger had for them. AMFY mentors had to complete new forms to satisfy legal and insurance requirements involved in transferring to BBBS. AMFY staff had to do additional documentation on files to meet BBBS national standards. Financial and fund development data had to be unified. A new BBBS organizational structure, job descriptions and reporting relationships had to be formalized. Computer systems had to be integrated, and data had to be archived, transferred or re-input. All this and much more had to be accomplished by August 15, 2008, when schools were set to open.

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Moore remembers the challenges of this phase, “Doing the merger was a full-time job for many of us. Yet we still had to do the daily work of running our organizations and maintaining our programs. We knew things were going to be missed or not handled as well as we’d like. So we had to keep the attitude that, to get it right, we’d just go back and re-do what wasn’t done well or was missed.”

Thanks to this positive attitude, dedication and hard work, all the critical elements were in place when AMFY staff moved to BBBS on August 6, 2008. They were terminated as AMFY staff and hired as BBBS staff on August 15. AMFY volunteers were terminated that same date, and engaged as BBBS volunteers once all necessary documentation was complete. AMFY assets were transferred in phases, a media launch was held to transition from AMFY to the new “mPower Program”, and the merger was essentially done.

It is important to realize, however, that integration is not complete on

the official merger date. Rather, it is an ongoing process. Many integration tasks have continued since the date of merger, such as the formal dissolution of the AMFY organization and the alignment of program evaluations. Other long-term tasks are expected to be complete by June 2009.

Reflecting Back

Has it all been worth it? Has the merger strategy created the intended impact?

“Already we’re seeing that we’re in a better position to move mentoring forward,” reports Moore. “We’ve had more calls to partner, to collaborate, to get involved in new initiatives. We’ve increased our profile, our media recognition and our ability to respond to community opportunities. We’re doing things we could not have done – or could not have done as easily – as separate agencies.”

Moore also acknowledges that there have been bumps along the road, such as insufficient time spent helping staff process the change, and temporary setbacks in other areas of the organization due to the focus of energy on the merger.

Although Rubenstein chose to pursue new challenges post-merger, her commitment to and belief in the merged organization remains strong. “The benefits were greater than we thought at the start ... We achieved all we wanted and beyond ... The merger is a multiplier.”

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At the same time, Rubenstein acknowledges that there will be challenges ahead, and the organization will need to continue to evolve. “For me, success is not today ... The legacy is not the merger itself ... Success will be determined by what results a year or two from now.”

Should We Be Looking to Merge?

Maybe you've never considered merger as a strategy for advancing your organization's mission. But should you be doing so? Or perhaps you have thought of merger as one strategic option, but you're uncertain if it's an alternative worth further investigation. How can you know for sure? Unfortunately there is no proven diagnostic checklist that will guarantee merger is the way to go. However, asking some key questions and candidly assessing your organization's circumstances can help clarify whether merger is a strategy that your group should seriously contemplate.

Why Merge?

Why would a nonprofit organization even consider such drastic action as a merger?

Merger is a rather uncommon phenomenon in the Canadian nonprofit sector. This is likely due to a number of factors that can hinder nonprofits from regarding merger as a strategic option. The resistance may be related to strong emotional ties to existing organizations, a view of current programs as unique or sacred, ego and turf issues, or difficulty with change. Examples of unsuccessful mergers often create fears and opposition to this strategy. Or sometimes the barrier is the volume and complexity of work that a merger might involve.

Despite such resistances, the call for consolidation in the sector is growing louder. Many question the sustainability of the large and ever increasing number of nonprofit organizations, given the funding, volunteer effort and expertise required by each. Human resource issues, an economic downturn, increasing or shifting client demands, and other operational challenges may provide the impetus for groups to consider merger.

Often, though, the driving force behind merger is positive in nature. By combining with another organization, an agency might create a convenient "one-stop-shop" for its users. Or it might build the critical mass necessary to accomplish tasks the agency could never achieve independently. Growth and leadership positioning may also act as merger motivators.

Such was the case when the Alberta

Mentor Foundation for Youth (AMFY) included merger on its list of strategic options. Donna Rubenstein, AMFY's former Executive Director recalls, "Our environmental analysis told us that, if we wanted to achieve our vision of growing and serving the community in a much larger way, we needed to do something different, to operate differently ... We realized that by joining forces we could leverage resources and do so much more with what we had."

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What are the Alternatives?

But merger was not the only alternative AMFY had to achieve the goal of multiplying its impact. "Merger was only one option," reports Rubenstein. "...We began to look at working with various youth-serving agencies in a variety of ways - partnerships, collaborations and other models on the continuum."

So how can an organization tell whether merger is an option to consider, or whether other forms of working together would suffice? David La Piana, author of several excellent merger resources, recommends that collaborations are appropriate when the work to be done together requires a shorter term commitment, and allows for decision making power to remain with each organization. Joint purchasing or a joint volunteer training opportunity could be examples of collaborative efforts.

La Piana suggests that a more

formal strategic alliance, guided by an agreement, is called for when the work to be done together requires joint or transferred decision-making and a commitment that continues for the foreseeable future. Shared services, a shared facility or a joint program, for instance, would likely require a strategic alliance.

But when the mutual goal involves the agencies' fundamental purposes, such as strengthening the total organization or improving the capacity to strive towards a shared mission, La Piana advises merger.

Sharon Moore, Executive Director of Big Brothers and Big Sisters of Calgary and Area (BBBS) – the agency with whom AMFY eventually merged – reports that BBBS initially looked at working with AMFY through a small joint pilot program or shared staff. But as the two agencies discussed their similar visions and core values, they began to imagine the possible synergies that could be gained by combining their complementary strengths. It was then that merger stood out as a real option.

Where do you Begin?

Thus, to determine if merger is for you, start with the "end" in mind. Revisit your organization's mission and vision. Conduct strategic planning to determine where the organization is at now, where it is headed, and what it is ultimately hoping to achieve. Then ask if merger can help get you there.

"I didn't come to the Board and start by saying, 'Let's merge with BBBS,'" emphasizes Rubenstein. "First we had to get focused on the vision and the strategic planning

process, and get clear about our mission to serve youth versus the organization.” Rubenstein believes it was that focus on the ultimate goal that eventually pointed AMFY in the direction of merger.

As you ponder whether a merger can move your organization closer to achieving its vision, also keep in mind the outcomes that a successful merger can produce and what it takes to achieve these ends. A higher profile, increased funding, a broader continuum of services and better quality programs are a few possible outcomes of a merger that is done well. However, these ends are not immediate nor are they guaranteed. If it is your organization’s goal to reap these benefits, it must be prepared from the outset to dedicate time, resources and careful planning and implementation.

What are Your Circumstances?

In addition to considering the ends you wish to achieve, it is important to assess your organization’s circumstances and strategic issues. Your answers to some key questions about your situation can help determine if merger is a viable option for your organization:

1. How stable is your organization? Although crises of leadership, finances or image can serve as merger motivators, it is preferable to bring some stability to these situations before embarking on a merger. To be done well a merger requires a great deal of time and energy – commodities which are in short supply during a crisis. Further, a crisis weakens an organization’s desirability and position as a merger partner. “One of the keys to the success of the AMFY-BBBS merger,” reflects Moore “was that both organizations came from a position of strength.”

2. Are you prepared to take a risk? A merger can have many positive, transformational effects. But merger success is not assured. Negotiations could break down.

Some staff and volunteers might leave. Anticipated benefits could fail to materialize. Experience and comfort with calculated risk-taking can help the organization to take the inevitable leap of faith a merger requires. “BBBS’ experience with collaborations and with merging three organizations thirteen years earlier, gave us confidence to move forward with the AMFY merger,” believes Moore.

3. Is your organization open to growth? By combining two or more organizations, a larger organization inevitably results. In many cases, such as the AMFY-BBBS merger, a desire to grow is the impetus for the merger. However, you must also consider such issues as optimum size, potential loss of “intimacy”, and the affect of growth on programs, service users, staff and volunteers.

4. What is happening with your service users, programs and services? Are your service users asking for something that you do not or cannot currently provide? Does your organization offer only a piece of a larger service delivery pie? Are your programs similar or complementary to those of another group in your area or do you serve a related population? If you can answer yes to these questions, merger might be an option.

5. What is your financial state? Is your long-term funding in jeopardy? Is it necessary to curtail or postpone necessary expenditures due to dips in your cash flow? Financial pressures, economies of scale and cost efficiencies are legitimate merger incentives. However, a merger that is purely about cost-cutting or financial emergency may miss the mark. Financial efficiencies are often not realized for a year or two post-merger. Even then, cost increases might not cease, but merely slow.

6. How are your human resources faring? Are you struggling to recruit or retain staff,

volunteers and board members? Are your existing human resources burning out? Are staff required to be Jack’s/Jane’s of all trades, but able to be masters of none? Do you lack the specialized expertise you need? Is the Executive Director/C.E.O. position vacant or soon to be vacant? If so, merger could be part of the solution.

7. What is the condition of your public image and leadership profile? Does confusion exist in the community regarding what your organization does or how your services differ from those of a similar group? Is your image suffering due to a scandal or shift in community priorities? Are you too small to wield influence? One objective of the AMFY-BBBS merger, for instance, was to create the profile and influence needed to expand mentoring exponentially.

8. What is your organizational capacity like? Is an inadequate infrastructure or lack of expertise or capacity preventing your organization from achieving its goals? Combining your organization’s strengths and resources with those of another might provide the size and competence needed to achieve what each of you alone could not.

If your ability to fulfill your mission would be strengthened by combining with another group, then it is your duty to seriously examine the merger option.

The Ultimate Question

In the end it all comes back to the beginning - to mission. Why does your organization exist? Likely it exists to facilitate a positive impact for those you serve. If your ability to fulfill your mission would be strengthened by combining with another group, then it is your duty to seriously examine the merger option. A clear focus on the ultimate vision will virtually always shepherd you towards the best decision.

We're Thinking About Merging ... What do We Need to Consider?

Merger typically involves major transformation. Such fundamental change can be scary, but it can also yield major benefits. So first, congratulate yourself on displaying the courage required to consider merger as a strategic option! Next, get ready to undertake some important preliminary work that first will help to determine if this is the best strategy for your organization, and then will increase the likelihood of reaping those potential merger rewards.

Finding a Match

The first consideration in a nonprofit merger is ensuring a good match. But how do you find the right partner?

Well, how did you link up with your best friend or spouse? You probably connected informally and gradually while pursuing common activities and interests. Or maybe you found one another through more deliberate means like an internet matching site or a formal introduction by a third party. As you got to know one another, you likely discovered shared values and goals, complementary strengths and weaknesses and congruent expectations. A basis of trust and respect began to build, and you had the makings of a good match.

Finding a merger partner (or partners) is not that different. Often a merger partner is identified through an organic process. The relationship between organizations usually develops naturally as staff or board members interact at meetings, conferences and events. As they get to know one another over time, they often discover they have common objectives and needs that can be fulfilled by their complementary capabilities. Cross referrals, a joint event or project, or even shared space arrangements might evolve. Trust builds through these collective experiences, and opportunities to work even more closely become evident.

Such was the case for the Alberta Mentor Foundation for Youth (AMFY) and Big Brothers and Big Sisters of Calgary and Area (BBBS). These two mentoring organizations had worked cooperatively for years, and often

sat at the same consultation and coalition tables. In time, these agencies both had collaborative Executive Directors, who shared common values and goals. A positive and trusting relationship gradually built. It was then that natural discussions of partnership opportunities - and eventually merger - began.

Occasionally, however, identifying a merger partner follows a more intentional, strategic path. Often it starts with a tactical decision to pursue a merger for such purposes as growth or increased profile. Other times this path is taken due to strong encouragement or even a requirement by funders to investigate merger. Or sometimes a potential merger partner must be sought due to organizational sustainability concerns such as a leadership vacuum, financial difficulty or public relations crisis.

It is important that the relationship between partners is grounded in familiarity and mutual trust and respect.

Whether your search for a potential partner has been deliberate or has happened more organically, it is important that the relationship between partners is grounded in familiarity and mutual trust and respect. Developing such a relationship requires some time, openness and shared experiences.

Popping the Question

Once you have identified a group with whom your organization is interested in exploring a merger, it might seem awkward to raise the merger topic. You may be uneasy about confidentiality, about

creating the suspicion that your organization is in dire straits, or about appearing threatening to the other group.

For AMFY and BBBS, the topic arose quite naturally. "[BBBS Executive Director Sharon Moore] and I had been looking at ways to partner," says Donna Rubenstein, AMFY's former Executive Director. "When we discovered we had a lot in common - similar visions, values, beliefs and passion about mentoring - I presented the idea of merger. We took it to our boards, and AMFY made a proposal to BBBS to get together and discuss the idea."

Introducing the merger topic may be easiest as part of a conversation between leaders with an existing, positive relationship. If no such relationship exists, a third party with contacts at both organizations may be willing to provide an introduction and help initiate dialogue. Otherwise, a cold call to the other organization is necessary.

While it is important to be frank with your intentions, using the "M" word may be too intimidating as you open the conversation. It may be preferable to begin by suggesting a meeting to discuss common goals, explore partnership opportunities, or talk about ways of working more closely together.

Regardless of how the merger topic is introduced, your organization's board should be in agreement before moving forward with discussions. Board delegates and senior staff from both organizations should be involved in meetings if the other group is interested in exploring a closer relationship.

Your representatives must approach these discussions with clarity about your organization's strategic issues and goals, and how merger might address them.

Starting the Conversation

When an interested potential merger partner has been found, a meeting should be convened to get to know one another better and explore your mutual interests. This is necessary even if your organizations are quite familiar with one another, as misconceptions are common.

Early conversations should allow each group to share some general information about itself. Discussions need not get bogged down in detail at this point. A skilled facilitator can help steer the fact sharing towards brief descriptions of each organization's history, values, mission, vision, governance, strengths, weaknesses and challenges. All parties should have the opportunity to check out assumptions and dispel any myths.

The objective at this stage is to assist each organization to determine if the other is a compatible match. Does the other group have values similar to yours? Are their strengths and weaknesses complementary to yours? Can you trust them? Is there more to be gained by working together than by working independently?

"The first joint meeting with AMFY set the foundation around values, mission and vision. Our first discussions were exploratory," recalls BBBS' Moore. She adds that the outcome of the meeting was very positive. Based on the groups' common principles and goals, everyone was keen to move ahead with merger negotiations.

It might take several meetings to get to that point of deciding on next steps. To help, the delegates may wish to also consider other ways of working such as joint programming or shared administration. It can

also be useful to put all the non-negotiable items on the table by asking what must be achieved and what must be preserved in a merger of your organizations. Both groups must carefully weigh the "Why merge?" and "Why not merge?" debate. It can be helpful to chart out the pros and cons of merger and other models of collaboration for all to see clearly.

Making a Decision

Taking into account all the vital information presented, as well as experiences with one another to date, each organization will have a decision to make. Perceived incompatibility, concerns about the other group's weaknesses, or mistrust could lead your group to back away from the table. Another potential partner can then be sought, or you can take more time to develop a relationship with the existing potential partner.

Another option would be to decide that your strategic objectives can be met by working with this group in a collaborative model other than merger. Your organizations can then determine the nature of that collaboration and establish a suitable partnership agreement.

"It should never be a merger for the sake of merger. The merger must be in service of a bigger vision that you share."

Finally, having determined that this is a compatible match, your delegates could recommend pursuing a merger with your potential partner. The decision to move forward with a merger must ultimately be about attaining something greater for those you serve. "It should never be a merger for the sake of merger," advises Rubenstein. "The merger must be in service of a bigger vision that you share."

Taking the Next Steps

Once the parties determine that they are interested in embarking on

a merger, it is necessary to take that recommendation back to the boards of directors for formal approval. Each board should appoint representatives to a merger committee, and empower them to carry out negotiations on the board's behalf. Typically the merger committee consists of the Executive Directors or CEOs and three or four board delegates. These people will become the merger champions, so it is important to select them carefully.

Before proceeding with formal merger negotiations, a basic memorandum of understanding ought to be drawn up. It should outline such terms as the groups' intentions to move towards merging, the process to be used to carry out these intentions, the means by which the process will be coordinated, confidentiality expectations, and the way related costs will be dealt with.

A facilitator who is skilled in nonprofit mergers and credible to both organizations should be engaged prior to beginning negotiations. While a good facilitator comes at a price, the investment will save much time, frustration and effort. Many funders are open to assisting with the related costs.

Not only does a merger cost money to carry out, it can take a lot of time. To prepare for a merger, it is therefore important to consider how the organization will carve out time from what is likely an already full schedule. Moore offers this sage advice, "Think of what you can let go of to allow you to deal with the merger. You may need to revise your goals for the year to make this happen. Bring in extra resources to help with workload if you can. You'll need to give the merger the time and focus it demands."

By investing in these preliminary steps, your organization will lay a strong foundation on which to build a positive merger process.

We've Decided To Merge ... Now What Do We Do?

Merging nonprofits can be a substantial undertaking. The work ahead can seem daunting, with so many areas to be dealt with, so many stakeholders to be considered, and so few examples to follow. Where do you start? What steps must you take? Not to worry! With a tried and proven process like the one described here, as well as some hard work, flexibility and determination, you will find your way through the maze and be well on your way to full integration.

Preparing the Preliminaries

Compatible nonprofit merger partners? Check. Approval from the boards of directors to move forward with merger negotiations? Check. Energetic, carefully selected merger committee? Check. Basic memorandum of understanding outlining how negotiations will occur? Check. Facilitator skilled in nonprofit mergers? Check. Great! You are ready to move beyond the question of, "Are we going to merge?" to tackle the question, "How are we going to merge?"

(If you cannot check the items off this list, have a look at another article in this series, "We're Thinking About Merging ... What Do We Need to Consider?")

To answer the question of how to merge, the merger committee and the facilitator must begin by agreeing on an overall process for planning the merger.

It is important, for instance, to clarify roles ... who will do what? The merger committee's role is typically to oversee the merger process. They meet regularly and provide decision-making on critical issues. It is also their job to ensure each organization's board is kept informed of progress.

Merger committee members also participate in smaller working groups, together with other targeted board members, staff and volunteers. The working groups research and develop the details of the integration plan, which is like a roadmap that charts what needs to be done to unify the various key areas of the organizations. The working groups need to meet

frequently to conduct due diligence and develop their plans. They present their recommendations at the merger committee meetings for negotiation and approval.

The facilitator's overall role is that of a project manager. This role often entails acting as a guide to the merger process and timeline; as a taskmaster to assign jobs and keep the process on track; as a coordinator of activity; as a facilitator of discussions and decision-making; as a mediator in negotiations; and as a cheerleader to provide ongoing encouragement.

Additional support is often called in from consultants or skilled volunteers. For instance, lawyers, human resource advisors, communications specialists and real estate professionals often have roles to play at particular stages of the merger.

Along with defining the primary roles, the merger committee must also determine major milestones and timelines from the outset. For example, target dates could be set for the completion of the integration plans, the signing of the merger agreement, and operation as a unified entity. The roster and schedule of important milestones will need to be flexible. However, the merger is likely to stall in the absence of a carefully planned and monitored timeline.

Perhaps most important at the start is the articulation of the guiding principles for the merger. These directives will steer the working groups' discussions and recommendations and the merger committee's decisions. The guiding principles are those items

that the merger partners are not willing to compromise. Some of these principles might be statements of values, non-negotiables, goals or ground rules. Any terms and guidelines that provide the merger partners with sufficient comfort to proceed can be stated as principles.

It is helpful to write the guiding principles, roles, milestones and timelines into a brief "merger planning process" document. You might also wish to include in this document a preliminary budget for merger related costs, reporting templates to be used by working groups, key questions for the working groups to address, and any other information that is vital to the merger planning process. This document can then be shared as a "guidebook" for all those involved in the work of the merger.

It is also critical to develop a preliminary communication plan very early on. The plan should outline who needs what information when, and how that information will be conveyed. Staff should be informed about the merger as early in the process as practical, and the communication plan should provide them with guidelines and key messages for communicating about the merger.

All these critical preliminary preparations must be accomplished in a timely way in order to gather positive momentum for the merger. When the Alberta Mentor Foundation for Youth (AMFY) merged with Big Brothers and Big Sisters of Calgary and Area (BBBS), time was of the essence. Former AMFY Executive Director, Donna Rubenstein recalls, "It was

early January and we needed to be operational September 1. We asked, ‘What do we need to get there?’. So, in the first month we focused on good planning and on getting a road map.

Planning the Work

Once a process for planning the merger is agreed upon, the work begins on determining what the merged organization will look like. Working groups focused around several key areas of the organization begin to plan the work involved in achieving that vision.

While it was important in earlier stages of merger discussions to avoid detail, this phase of work gets down to specifics. As part of each merger partner’s responsibility to conduct due diligence, it is now necessary for the partners to provide full disclosure of their organizations’ circumstances ... warts and all!

But to create the most positive merger outcome, working groups must also look beyond the organizations’ present situations to envision the best new organization possible. This can mean keeping the strongest elements of each of the existing organizations, but it should also involve looking for innovative practices not currently in use by either partner.

Envision the best new organization possible. Look for innovative practices not currently in use by either partner.

To form a clear vision of the merged organization, and to plan the specific tasks that will make the vision real, the working groups must consider some key questions. Following are examples of the issues each working group needs to address. (The working groups outlined here are built around the major functions of most nonprofit organizations. Your organizations may choose to categorize working groups differently.)

1. Legal – One of the first matters is to determine what form the merged organization will take. For instance, will the larger organization absorb the smaller one, and then the smaller organization winds down? Or will existing organizations dissolve and a new organization be formed? Provincial incorporation legislation outlines the options and requirements for merger, dissolution and incorporation.

Federal taxation legislation must also be considered. Issues regarding charitable registration, business numbers, GST accounts and final T-3010 returns need to be resolved. Canada Revenue Agency should be consulted to determine all current requirements relating to the merger and dissolution of existing organizations.

Other legal matters to be addressed may include any leases, mortgages, purchase of service agreements or other legal contracts. A review of current insurance policies and future insurance needs must be done. Other risk management issues should also be examined. Existing or pending lawsuits must be disclosed and dealt with. The legal working group is also in charge of drawing up the formal merger agreement, to be signed by the merger partners’ boards prior to proceeding with integration.

2. Governance – The structure of the merged organization’s board and committees is a critical point to address early on. Whether a new organization is being formed, or one group is absorbing the other, a way of representing both organizations’ interests should be found. Designated board representation or advisory committees are common solutions.

Other governance issues to be resolved include the new board’s governance model, differences in board “cultures”, the archiving of the dissolving organizations’ corporate documents, and the

creation or revision of by-laws and mission and values statements. It is also necessary to determine what is required under each organization’s governing documents to approve the merger, wind down the organizations and disburse assets.

3. Programs or Services – Although many of the issues to be addressed by this working group will be unique to the type of programs or services offered, there are a number of questions that will be common to many. For instance, how integrated and streamlined will the programs of the merging organizations become? Will there be a single point of entry for services users to access all programs? What needs to happen in order for existing clients and service delivery volunteers to “transfer” to the merged organization? Are program changes necessary to meet certain accreditation standards or contractual commitments? How can program statistics and outcome measures be combined? How will file documentation be unified? What will be done with the dissolving organizations’ historic case files? How will you address a clash of program cultures?

4. Human Resources– Staffing concerns are among the most sensitive matters in merger negotiations. Fears of change, job loss and pay decreases will negatively impact morale, productivity and staff retention. It is therefore important that decisions regarding staffing are made and communicated early and with great care. In fact, frequent communications about all key aspects of the merger are essential for staff. A skilled human resource professional can help the working group plan these communications and answer the many delicate staffing questions.

One of the first questions asked in a merger is who the leader will be. Ideally, one Executive Director is planning or willing to leave the

organization, or to assume a different role within it. Where the Executive Directors of both organizations wish to hold the leadership position, several options exist. A selection process may be held to determine which of the Executive Directors will receive the position. This process could also be opened to outside candidates. In the exceptional case of two Executive Directors who have common values and philosophies, a strong, compatible relationship, and complementary skills and interests, co-directorship may be considered. In any event, the leadership question should be answered early.

The human resources working group must also create the new staff structure, and place existing workers within it. Reporting relationships, job descriptions and personnel policies must be determined. Processes should be established for dealing with any redundant staff and filling currently vacant positions. Discrepancies in qualifications, skills and job duties among similar positions must be resolved. Discrepancies are also likely in salaries and benefits, and the working group should aim for a solution in which no one “loses” when the net impact is calculated.

Loss of one sort or another is inevitable for staff in a merger, however. Even if no jobs are lost, through the merger, loss of familiarity, work space, closeness, connection, status and responsibilities are common experiences for staff in a merger. The human resources working group should plan a variety of strategies to help staff work through these losses, adapt to change, deal with culture clash and build a strong, trusting new team. Expect that change management and team building efforts will need to occur more than once or twice. A variety of strategies will be necessary during merger planning and into the time of integration.

By the merger date, a process must

be in place for terminating staff from their existing organizations and “re-hiring” them into the merged one. By day one of the merger, staff will also need a thorough orientation to the new organization. A plan for addressing training needs should be developed to ensure all staff have the knowledge and skills necessary to perform their job functions. It will be particularly important to give supervisors the tools necessary to help their staff deal with change.

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5. Finance & Fund Development

– One of the first tasks of the finance and fund development group will be to work on the budget for the merger itself. Mergers create many one-time costs – lease buy-outs, moving expenses, facility renovations, technology upgrades, staff and board training, website redesign, and media launch costs to name a few. The details of these expenditures must be determined, and funding sought to cover them.

A preliminary budget for the new organization should also be developed. To do so, much research is required. For example, current revenues and expenditures of the existing organizations should be disclosed. Conversations with present funders and donors must occur early on to determine their level of continued support post-merger. Plans must be created for unifying, maintaining, scaling back or growing existing fund development campaigns and events. Cost efficiencies and new expenditures resulting from the merger must be identified.

The assets and liabilities of the existing organizations should also be identified, and a plan made for

transferring them to the merged organization. The working group must determine how to deal with any restrictions that might exist on the transfer of assets and liabilities like endowments or mortgages.

Winding down the existing organization and ramping up the new also requires a plan for closing old accounts and opening new ones, conducting closing audits and appointing a new auditor, as well as reviewing current finance and fund development policies and affirming new practices.

6. Facilities, Equipment & Technology

- Many details must be addressed regarding the tangible and technological items that allow the organization to do its work. For example, it is necessary to determine the facility requirements of the merged organization. From where will everyone operate? Are renovations required? What needs to be done to change or terminate any office or facility leases? If a move is necessary, detailed moving plans must be made, along with the changeover of addresses, organization name, and accounts with suppliers and any customers.

As for equipment, it is important to do an inventory of the existing organizations’ equipment and supplies. In comparing these lists, redundant equipment can be identified and a plan created to dispose of it. The working group should also determine the merged organization’s new equipment needs and plan to acquire it.

An assessment of existing phone, computer, and other technological systems should be done to gauge compatibility, upgrading needs, and any other requirements to unify the systems. Data transfer and archiving must also be considered. A plan should be made to train staff to effectively use the technological systems of the unified organization.

7. Partnerships & Affiliations – If the existing organizations are

affiliated with, or accredited by, any larger bodies such as national or provincial associations, it is important to first decide if these affiliations will continue. If so, it is necessary to discuss the merger with the larger bodies and establish if the unified organization and its programs must meet any specific requirements to maintain the affiliation or accreditation.

Similarly, any partnerships or agreements with other community agencies or businesses must be examined to determine if these relationships will continue, and what needs to happen for the merged organization to maintain its partnership obligations.

8. Communications & Marketing

- The preliminary communication plan developed at the outset of negotiations provided a guide for communicating about the merger in the early stages. The communications working group must build on that plan by answering many additional questions. For instance, what will be the name of the merged organization? How will the new organization be branded? What will be done to unify the organizations' communication tools, such as websites, brochures and display units? How will the merged organization be launched in the media? What marketing strategies will be pursued to realize the potential for a higher profile? How will the merger be celebrated internally?

BBBS Executive Director, Sharon Moore, emphasizes the value of all these working groups' efforts in BBBS' merger with AMFY. "Breaking down the many merger questions into specialized areas to be addressed by people with the right expertise worked well for us. Charting all the integration tasks kept us on track and gave us a good visual of our progress."

As Moore implies, it is important to strategically select working group

members. Particular expertise from staff, volunteers, outside professionals and service users is needed to arrive at sound recommendations. Better decisions will be made by involving those whom the decisions will affect. And the decisions will be more broadly accepted by involving respected, influential members.

But working groups must not only involve varied stakeholders: they must also consult one another. The finance working group, for example, will be unable to create an accurate budget unless it works with the human resources group on its plan for restructuring staff and remuneration. Joint meetings can facilitate effective communication and decision making regarding issues that concern more than one working group. Each working group should also distribute progress reports to all other working groups and the merger committee. The merger committee must ensure the coordination of the working groups as it reviews their reports and recommendations at its regular meetings.

As the working group plans are developed, each group must create a detailed list of all the integration tasks to be accomplished. Each task on the chart should identify who is responsible for its accomplishment, as well as target dates for beginning and completing the task. Allow for tasks to be checked off as they are completed. This detailed integration plan must be revised and distributed among working groups and key staff regularly – probably weekly – as integration proceeds. The merger facilitator monitors all the detailed plans and ensures the tasks are on schedule. These detailed integration plans serve as the road map guiding every turn on the journey to the official merger date and beyond.

When all groups' detailed integration plans are substantially formulated, the merger facilitator can consolidate the highlights in a

summarized integration plan for each organization and its board to consider. The integration plan's key elements and guiding principles should be written into a formal, legal merger agreement. Each organization must approve the merger agreement and integration plan according to the process set out in its by-laws. Once approved, the agreement can be signed and integration can officially begin.

Working the Plan

Merger is a process, not an event. Although a merger date will be set in the merger agreement to identify when the two organizations officially become one, the work of implementing the integration plan begins before that date and continues for months after.

The work at this stage involves carrying out all the tasks identified in the detailed integration plans. But these plans are not static: the tasks and timelines must be modified as circumstances dictate. Momentum and accountability can be maintained by tracking progress and communicating the changes on a regular, ongoing basis.

The people involved in implementing the plan will also change. As additional staff and volunteers are drawn in to assist with integration tasks, they must be provided with the guiding principles, background and direction necessary to ensure they capture the vision. And as the involvement of the merger team, working groups, and facilitator abates, the integration goals must become part of the regular work of the merged staff and board.

Thus, the focus gradually shifts from integration to the work of achieving the new organization's mission. BBBS' Moore reflects on the gratifying nature of this shift, "Every day it feels more unified. And every day it's more and more exciting to see us move towards accomplishing the objectives and vision set out for the merger."

How Can We Ensure Our Merger is Successful?

Merger success will mean different things to different organizations. For some, success may simply be the survival of their programs or services. For others, merger success might mean getting through the negotiation and integration process with minimal conflict and loss. Ideally, the definition of success in your merger is much grander, like creating a positive, transformational impact in your community. The reality is that mergers can have many positive outcomes, as well as some unintended negative ones. There are no guarantees of total success. By following the wisdom of experience, however, you can maximize the benefits and minimize the drawbacks in your merger.

The Upside

What are your desires and expectations in a merger? Perhaps your organization is hoping to expand its public recognition and media profile. Maybe your goal is to serve more people and have a bigger community impact. Cost savings, an accessible continuum of quality services, increased organizational capacity, and stronger staff and board teams might also be among your hopes.

But are these synergistic outcomes really possible? Sharon Moore, Executive Director of Big Brothers and Big Sisters of Calgary and Area (BBBS) confirms they are, several months post-merger with the Alberta Mentor Foundation for Youth (AMFY). “We’ve had the opportunity to expand rurally and in our existing and new urban schools. Young people and families can transfer between programs more easily now, and have more opportunities to be mentored and to mentor. We’re being put on a platform to take leadership roles in collaborative efforts. There have been some financial and supervisory efficiencies. It’s exciting. There is a buzz around here. Our vision of a mentoring culture is happening.”

Donna Rubenstein, former Executive Director of AMFY agrees. “By merging, the AMFY program has gained access to more resources, more collaboration opportunities, name recognition, staff development and operational efficiencies.”

The Downside

However, both Rubenstein and

Moore admit that the merger process was at times difficult, and that there have been a few undesirable outcomes.

“The AMFY program no longer has a focused, individual, unique identity and profile. Its reputation has been diluted, as part of a larger agency,” Rubenstein reports. “In a larger organization there is also less of a personal touch, a loss of intimacy, less staff connection to the leadership and board, and some loss of speed in decision-making.”

Moore further acknowledges that the merger experience was intense and at times took the focus and energy away from other important agency initiatives. She particularly regrets that the pace of the merger left little time for staff to process change. Moore wishes some human resource issues had been handled differently, to allow for an easier transition for staff and to encourage strong, trusting post-merger staff relationships.

The Insight

So what can be done to enhance the likelihood of desirable merger outcomes and diminish the potential of unfavorable ones? Merger experience and hindsight have born the following tips for a successful merger.

1. Timing matters. The best time to pursue a merger is when the partners are in positions of strength, and are able to make well considered decisions. Although mergers done in times of crisis can be successful, it is preferable to do it before you have to. However, if your merger is motivated by

financial or other deficits, Rubenstein recommends being as proactive as possible. “Instead of waiting and reacting to circumstances or trying to preserve what was, ask, ‘How do we adapt? Given this environment, how do we take advantage of it rather than just react to it?’”.

The time demands of a merger may cause you to delay embarking on it. But if you wait for a time when the organization has few other competing commitments, the merger may never happen. Balance merger activities with the organization’s regular business. You may need to scale back some goals and activities, or secure additional resources in order to get the merger done. If possible, avoid or minimize other concurrent changes in the organization.

2. Keep your eye on the prize. Mission should be at the heart of the merger. Before your organization even decides to go down the merger path, revisit your mission and values and clarify the outcome - the prize - you envision. For greatest success, the merger must be about achieving a grander vision, about creating a movement or having transformative impact.

The initial decision to merge and all the merger plans that follow become easier when you focus on the best interests of those you serve, rather than the best interests of a specific organization or individual. Take the time with your merger partner to develop a shared set of values and principles. Then, if your group gets hung up on the photocopy lease or other

details, move past these blockages by refocusing on mission and values. Ask, "Why are we here?" and "Does it fit with our values?"

3. Know thyself ... and thy merger partner! Knowledge, trust and respect are the foundations of a positive relationship, and are built only through exposure and shared experiences. Create chances to get to know one another and build a solid relationship through joint board or staff events, small joint projects and other information sharing opportunities.

Although BBBS and AMFY had prior exposure to one another, they gained the confidence to proceed with merger talks only once deeper familiarity was established. An initial meeting was held with key board members of both organizations, in which they discussed their values, principles and visions. Steele Curry, former AMFY President and now a BBBS board member, believes that creating this basis of commonality was critical. "Both organizations shared a similar set of mission, vision, values and organizational cultures, plus had a healthy mutual respect for each other," he recalls.

Full disclosure also contributes to a respectful, trusting relationship. Check out assumptions. Discuss non-negotiables, assets and liabilities early in negotiations.

4. Get the right expertise. You need help to get the merger done well. A trusted, knowledgeable facilitator can guide you through the process. Rubenstein recommends that, "You need a facilitator with expertise in project management, mergers and organizational change." The expertise of capable lawyers, communications specialists, human resource professionals and others will also be required at various stages of the merger.

5. Exercise strong leadership. While a facilitator and external

consultants can be very helpful in the merger process, much of the merger work is the responsibility of the board and senior staff leaders. These leaders must buy in to the merger vision and process, as it is their job to connect other stakeholders to the vision and engage them in the process.

Leadership can be tricky in the time between the merger decision and the formal merger date. This transition period can feel like a "limbo" in which no one is sure how decisions should be made. To ease this uncertainty, determine early on who will lead the merged organization. Work out an interim decision making process. Existing Executive Directors must converse often, make joint decisions when possible and convey a common message. Trust of one another can be tested during the transition. What helps is a strong relationship and open communication between leaders, along with commitment to guiding principles and to seeing the process through.

Rubenstein recalls how she and Moore got through this time, "We regularly met, held to the principles, but had flexibility and room for compromise ... We did things jointly, but also respected one another's authority. Although I was leaving, Sharon drew on my experience, expertise and influence."

6. Keep people informed and involved. Timely, clear and open communication with all stakeholders throughout the merger process calms their anxiety and secures their support. People will take ownership for the new organization and its success if involved in the plans and decisions that affect them.

7. Tend the human resource garden. Rubenstein likens the merger to transplanting an established garden, "There are different kinds of plants, each with different needs and reactions.

Because of how grounded they were, some might need a little bit more nurturing than others ... Tend the garden ongoing, or weeds and thorny issues will get in."

Early and frequent communication with everyone during the planning and integration process is essential, particularly with staff. Be clear with people about how the merger will affect them. Help them deal with change and loss. Spell out expectations for people so they know how to move forward. Deal humanely and expediently with redundant staff. Treat all with respect throughout the process.

"Emotional stresses come with merger," observes Moore. She recommends using a wide variety of strategies to help people process change and build a new team. "In addition to the staff meetings, team building and other sessions we had pre-merger, it would have been helpful to do things like change management training for supervisors, job shadowing in new roles, informal touch base sessions, and working together under the same roof on shared projects."

8. Make a plan, execute it and track it. Integration will not occur on its own. Articulate the goals for the new organization, and have working groups create and implement the blueprint to achieve those outcomes. Track and broadly communicate progress and changes to the plan. Encourage thoughtful planning and implementation, but do not allow excessive detail and prolonged negotiations to stall progress. Hold people to realistic but tight timelines.

Following this guidance can help your merger succeed. Be prepared that unforeseen problems can arise nonetheless. The best advice may therefore be to accept and acknowledge that the merger will not be perfect. Mistakes will be made. So resolve to simply go back and re-do what was not done well to get it right.

Where Can We Get More Information on Nonprofit Mergers?

Want to know more about nonprofit mergers? If the articles in this series have piqued your interest in nonprofit mergers and how to do them well, you may wish to dig a little deeper into the topic. Many print and web based resources can help. To take the next step in your learning, check out the ones listed below. These resources offer more details, direction and inspiration to help you consider merger as a strategy for creating the community impact you envision.

Books and Booklets:

- Arsenault, Jane. *Forging Nonprofit Alliances: A Comprehensive Guide to Enhancing Your Mission through Joint Ventures and Partnerships, Management Service Organizations, parent Corporations, and Mergers.* San Francisco: Jossey-Bass, 1998.
- La Piana, David. *Nonprofit Mergers: The Board's Responsibility to Consider the Unthinkable.* Washington, D.C.: National Center for Nonprofit Boards, 1994
- La Piana, David. *Beyond Collaboration: Strategic Restructuring of Nonprofit Organizations.* San Francisco, CA.: The James Irvine Foundation, 1997.
- La Piana, David. *The Nonprofit Mergers Workbook Part I: The Leader's Guide to Considering, Negotiating, and Executing a Merger.* Saint Paul, MN.: Fieldstone Alliance, 2000.
- La Piana, David. *The Nonprofit Mergers Workbook Part II: Unifying the Organization after a Merger.* Saint Paul, MN.: Fieldstone Alliance, 2004.
- McLaughlin, Thomas A. *Nonprofit Mergers and Alliances: A Strategic Planning Guide.* New York: Wiley & Sons, 1998.

Weblinks:

- Cortez, Alexander, William Foster and Katie Smith Milway. *Nonprofit M&A: More Than a Tool for Tough Times.* 2009. www.bridgespan.org
- Davis, John Emmeus. *The Making of a Nonprofit Merger: Bridging the Organizational Divide.* 2002. <http://www.nw.org/network/pubs/studies/documents/makingOfNonprofitMerger.pdf>
- Ferronato, Sherry. *Nonprofit Mergers: The perils and the possibilities.* An archive of Charity Village NewsWeek. 02/01/99. <http://www.charityvillage.com/cv/archive/acov/acov99/acov9904.html>
- Ferronato, Sherry and Perryman, Gavin, *Facing the Challenges of Organizational Sustainability.* An article posted in the Mentoring Canada Research Centre Library. 2003. <http://www.mentoringcanada.ca/DocLibrary/docsearchresults.asp?cat=7&sub=35>
- Ferronato, Sherry and Perryman, Gavin, *Non Profit Mergers and Other Deep Partnerships.* An essay posted on Gavin Perryman & Associates. 2003. www3.telus.net/gavinperryman/partnershipsandmergers.htm
- Hung, Prescilla. *Time to Merge? Fundraising & Financial Implications.* An article posted in Grassroots Fundraising Journal. January/February 2009. http://www.grassrootsfundraising.org/fmd/files/v28_n1_art01-DLD.pdf
- La Piana Associates Inc., A website with resources, research, case studies, tips and additional references related to various forms of nonprofit strategic restructuring, including mergers. <http://www.lapiana.org/sr/index.html>

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