

ENGAGING STAFF & BOARD

Collaborative Processes Around Organizational Affiliation



SUCCESS FACTORS IN MERGERS INCLUDE:

- Integral involvement of both boards in the merger process.
- Providing boards with evidence based information regarding the merger. The executives should coordinate this information so that the message is consistent to both boards.
- The inclusion and support of both administrative and non-administrative staff in planning and implementation.
 - Wilder Foundation (2012). *Success factors in nonprofit mergers.*



IMPORTANT INFORMATION TO SHARE

- What is motivating the desire to affiliate and what does each party hope to gain from the affiliation?
- How will an affiliation improve services to the beneficiary population?
- In general, how will any differences in human resource policies and practices be resolved?
- In general, how will the affiliation change operating structure, if that is the case, and impact jobs, if that is the case?



OPTIONS FOR INVOLVING BOARDS AND STAFF IN TRANSITIONING TO AN AFFILIATION

- Operate cross corporate transition teams including representation of both boards and all relevant organizational staff sectors.
- Operate cross corporate board teams but involve program staff teams only in affected program areas and with system administrators.
- Share the transitional time line across all staff in both agencies and provide executive briefings on benchmarks as they occur.
 - NOTE: *These options may be implemented separately or in combination.*

