



Organizational Integrations

Phase 1 - Exploration

There are varied reasons that organizations start the journey of exploring potential integration with another organization. Regardless of the driver(s), there are many possible options on a continuum of integration ranging from informal cooperation; to combining back-office functions; to sharing an Executive Director or other positions; to full mergers, takeovers or amalgamations. During this exploration phase, the following activities should happen:

Joint Leadership Meetings with All Organizations Involved

- Leadership Team/Board of Directors joint meetings with both organizations to determine if there is a compelling "why" for both groups. If there isn't a compelling reason for integration, it will be difficult to generate positive momentum and the road of any type of integration will feel all up-hill. The joint meetings should include:
 - Create space for building relationships with each other
 - Explore organizational benefits to and the challenges of integration
 - Assess alignment of mission/culture/values/ goals

Separate Leadership Meetings

- Each organization's leadership team/board of directors needs to review the content of the joint meeting and reflect on it from their own vantage point. This is the opportunity to identify any red flags of concerns that could ultimately result in an integration deal breaker.
- Determine which model of integration aligns best with organizational goals. The leadership team and board of directors must be comfortable with pursuing the next steps in the integration model. There are many different integration models – each with its own benefits and challenges. For example:
 - merger of two or more organizations to form a new identity
 - one organization absorbs another
 - shared executive leadership, governance and/or back-office support

Initial Communication

- This is important to ensure there is a general communication to all staff in the organizations that they are meeting to begin exploring the possibility of integrating.

This phase is often iterative. There is often more than one joint meeting, and often more than one separate meeting. Each discussion building on the last. Having more meetings builds trust within each organization and leads to uncovering more about each other. This stage is where conversations need to be intentional with clear outcomes, or potential integrations stall and never see forward movement. Sometimes this phase takes organizations several years. Other times, organizations start this phase and then decide not to go any further with a particular organization or at that particular point in time.

Outcomes for this phase:

1. A clear sense of the 'why' and awareness of the potential challenges
2. Agreement on the model of integration
3. Commitment of all stakeholders to proceed to the next phase

Questions To Ask in this Phase

1. Is there a compelling 'why' of integration that is clear and easily explained?
2. How aligned are the mission, culture, values, and goals of the organizations involved?
3. What concerns need to be identified before moving forward?
4. What model of integration is most appropriate for our needs?
5. Does the leadership team/board of directors believe in the benefits of integration?
6. Are we committed to moving forward with an integration model?
7. Do we have the positive relationships and adequate resources to commit to an integration project?



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