



# Organizational Integrations

## Phase 3 - Implementing the Change

Phase 3 is when all the discussions and planning become a reality. In this phase there are two large categories of work to happen:

1. Merging of Culture
2. Merging of policies and procedures, organizational structures, and finances.

Too often organizations focus time and resources into category two and fail to realize the importance of investing time and resources into merging cultures.

Merging or forming a new culture often includes the development of a new shared vision, mission, and values. Sometimes it also involved a new organization name and identity. However, one should not assume that these things will be sufficient to merge the cultures.

One might say that forming a new culture involves a thousand conversations. These conversations may take the form of presentations, team meetings, open forums, small group chats, and one-to-one conversations. All stakeholders need to be considered, including board members, wider membership, service users, employees at all levels. Other groups to consider may include donors, community partners, and funders. Employing and being informed by the theories and principles of change management can make this process go more smoothly.

Merging policies and procedures, organizational charts/structures, and finances may be time consuming work depending on the degree of alignment between the two organizations in these areas before the integration. Merging these more tangible aspects of the organizations may be more or less complex depending on the following factors (not an exhaustive list):

- Human resources: layoffs, natural attrition, recruitment, job class evaluation, collective agreements
- Significant procedural differences
- Scope of legal consultation needed
- Resource generation and asset management

Be aware that in many situations, there is overlap in phase 2 – planning for the integration and phase 3 – implementing the integration. Furthermore, the specific project plan timeline for implementation may be heavily influenced by the fiscal year-end dates.

### Outcomes for this phase:

1. Achievement of milestones and timelines according to the implementation plan
2. The model of integration is achieved including programs, policies and procedures, systems and structures as well as governance if applicable
3. Commitment to evaluate, review and conduct an organizational health check in order to ensure staff engagement continues

### Questions To Ask in this Phase

1. What is our desired organizational culture and how do we achieve this?
2. How do we engage effectively with all stakeholders?
3. How do we handle disagreements in the integration of organizational structures and resources?
4. When will the organizational health check take place?



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