Index

Accountants, 58, 106, 151, 220,	Asset base, 71, 80
Accounting, 58	Asset management, 43
Accounting, age, 13	Assisted living, 10
Accounting and auditing firms,	Association, 2, 35, 95, 102, 163,
157, 158, 170	224–226, 248
Accounts receivable, 167	Association management staff, 224
Accreditation, 129, 171, 172, 230	Attorney, 202
Accredited, 171	Attorney, labor, 141
Accumulated depreciation, 13	Attorneys, 47, 57,67, 106, 121,
Actors, 183	141, 171, 195, 196, 182, 201,
Adjudicated youths, 30	203,217,220
Administrative costs, 107	Audu, 158, 160, 164,
Administrative parent, 248	Audit opinion, 167
Administrative savings, 108	Audited financial statements, 164
Administrative services, sharing, 59	Auditor, 121, 160, 167, 168, 183
Administrators, 67, 138, 233,	Authority, 131
237, 241	Authority, concentrated, 66
Advisory committees (of boards),	Authority, diffuse, 66, 109, 132
75, 134	
Affiliates, 35	Baby boomers, 114
Affiliation, 51	Back-room operations, 66
Aged receivable: 161	Balance sheet, 167
Agreed-upon procedures, 157	Ballet, 58
AIDS crisis, 116	Balloon loan payments, 164
Americans with Disabilities Act, 163	Bankers, 183
Ancillary boards, 75	Bankruptcy, 123, 171
Antitrust, 11, 136, 137, 218	Banks, 217, 218
Art museums, 75	Banks as source of resistance, 127
Articles of incorporation, 159	Bargaining unit representatives, 172
Articles of merger, 67	Behavioral health centers, 115, 122
Artistic director, 83	Benchmarks, 230
Arts organizations, 92, 142, 164	Benefits, 143, 144, 202, 207
Asset, 13, 14, 27, 69–72, 102, 109,	Bennett, Paul, 26
126, 129, 157, 159, 162, 163, 168	Big Es (ego and economics), 212

DI 101	CORROLL
Blog, 181	C.O.R.E. Continuum of
Blue Cross/Blue Shield, 14	Collaboration, 47–106, 102,
Board, 20, 72–74, 125, 140	106, 132, 177, 219, 221, 225,
145, 215	227, 229, 230, 234, 244, 246,
Board composition, 133	247, 249
Board leaders, 26	Calendar time, 203
Board leadership, 189	Cape Cod, 220
Board meetings, 125, 179	Capital, 6, 10, 13, 14, 18, 19, 21, 89,
Board member resistance,	142, 161, 166, 169
214, 215	Capital assets, 234
Board member(s), 2, 22, 36, 39,	Capital contribution, 248
71, 72, 75–77, 88, 89, 120 123,	Capital expenditures, 62
124, 126, 127, 134, 136, 143,	Capital gift, 143
148, 151, 157, 167, 176, 179,	Capital investment, 248
189, 194, 195, 213, 214, 216,	Capital, start-up, 248
228, 231, 235, 243	Captive mutual insurance
Board minutes, 159	company. 50
Board of directors, 32, 48, 69, 85,	Case management, 246
122, 126, 129, 132, 134, 152, 159,	Cash, 18, 26, 27, 169
160, 161, 176, 180, 191, 228, 231,	Cash viow, 161, 166, 167
234, 242	Cash flow, present value of, 169
Board president, 76, 152, 243	Casting function, 83
Board, composition of, 73,76	Catalyst funds, 41
Board, officers of, 73, 77	Centralization, 125
Boards, 10, 19, 68, 72, 123, 133,	CEO (chief executive officer), 1, 2,
176, 188, 214, 243,	10, 14, 25, 30, 39, 48, 58, 66, 68,
Boards of trustees, 75	69.76, 78, 79, 86, 91, 97, 108, 109,
Bond, 142, 158	114, 117, 120, 122, 123, 125–127,
Bond covenants, 142	132, 140, 148, 151, 152, 159, 165,
Bond market, 143, 158	177, 179, 182, 188, 189, 190–192,
Bond market, tax exempt, 161	193, 195, 196, 197, 205, 206, 207,
Bond prospectus, 125	209, 210–212, 221, 226, 233, 242,
Book value, 162	243, 247
Bookkeeper, 209	CEO, interim, 39, 68, 151
Boss, 188	CEO/board relations, 228
Brand, 29, 66, 83, 109	Chaplin Charlie, 5
Breach of confidentiality, 168	Charter (board) membership, 75
Brinkerhoff, Garret, 26	Charter schools, 2
Budgets, 155	Circuit riders, 58, 59
9	
Business plan, 244	Classical music 193
Business plan, 244 Puv in institutional 241, 242	Clinia 103 115 194
Buy-in, institutional, 241, 243	Clinic, 103, 115, 124
By-laws, 48, 159, 160, 227	Co-CEOs, 191

Collaboration committee, 81, 124, 152, 156, 166, 171, 176, 178, 182, 183, 185, 186, 187, 189, 191, 192, 194–196, 203, 207, 213, 233, Collaboration committee members, 81 Collective bargaining, 11, 129, 138, 139, 140, 144, 172, 183, 216, Collective bargaining agreements, 177 Collective bargaining unit, 172 Colleges, 71, 105 Command and control, 96, 199, 217 Commodity operation, 58 Communication, 178, 180–182, 181, 198, 201, Communications, external, 185, 186 Community Development Block Grants, 236 Community development corporations, 83, 92, Community development managers, 236 Community hospitals, 143 Community innovation resources, 41 Compensation levels, 185 Compensation patterns (practices), 14, 144 Compensation planning, 182 Compensation subcommittee, 182 Competition, 8 Conferences, 223 Consultant, 121, 149, 150, 151, 187, 226, 228, 231, 248 Consultants, strategic planning, 150 Consultation, 127 Consulting contracts, 191, 193 Consumers, 36, 198, 204, 246, Continuing education, 235 Contracts, 171

Conversion foundations (also conversions), 14, 168, 202, 218 Cooperative, 220 Core competence, 118, 119 Corporate (level of collaboration), 48, 65–91 Corporate control, 96, 132–134 Corporate social responsibility, 105 Corporation filings, 68 Corporation membership theory, 85 Cost savings, 173 Covenants, 218 Credibility, 226 Credit unions, 116 Creditor payment, 29 Credits, 99 Critical juncture funds, 41 Cultural differences, 117 Cultural strengths, 173 Culture, 35, 67, 74, 120–126, Culture of transparency, 153 Curators, 236

Day care centers, 209, 234 Days in cash, 29 Debt, 100, 101, 143 December sag, 184 Decentralization, 125 Decertified (unions), 216 Decertify, 140 Decision-making process, 126 Deductions, 99 Deferred revenue, 163 Deficit, 10 Demographics, 125 Department of Justice, 11, 137 Depreciation, 10, 13 Development directors, 197 Developmental disabilities, 144 Developmental disability service providers, 237 Direct service employees, 36

Index

Directors, 157 Executive director, 166, 180, 181 Directors and officers insurance, 162 Executive team, 155 Disclosure, 127 Exit strategy, 102 Discounted present value (method Expenses, 166 of valuation), 169 Doctors, 123 Domestic violence program, 214 Fair market value, 69 Donor(s), 153, 182, 186, 197, 204 Donor base, 197 177, 180Donor education committee, 182 Donor losses, 198 Federated organizations, 35, 80, 148 Due diligence (investigation), 42, 70, 127, 156–158, 161, 163, 164, 171,22785, 214 Due diligence team, 159, 161, Fiduciary role, 157 171, 172Dunbar's Number, 15 Economic development groups, 2 Economic downturn (See recession) statements, 168 Economic motivation, 216 Form 990, 90, 119, 120 Economic size, 9, 10, 11, 13, 21, Foster care, 118 78, 114 Economic-based resistance, 215 Foundation funders, 37 Economics (level of collaboration), Foundation leaders, 38 48–56, 66, 219, 221, 233, 237, Foundations, 39–41, 152 239, 248 Founder, 122 Economics, 7, 9, 43 Founder-led, 34 Economies of scale, 117 Education, 92, 142, 171 Ego-based resistance, 213, 215, 216 Elder care facilities, 244 195, 225 Elder care organizations, 128 Employee benefit options, 163 135, 185, 195, 217 Employment contracts, 172, Fundraisers, 19 191-193 Fundraising, 161 Endowment, 29 Environmental groups, 12 Equity, 168 Geography, 13, 141 Executive, 36, 43, 67, 87, 89, 128, 147, 191, 194, 222, 224, Girl Scouts USA, 80 Executive committee, 75 Globalization, 7

Executive compensation, 172

Facilitators, 77, 149, 150, 152, 153 Feasibility, 42, 43, 45, 147–173, Federal Trade Commission, 11, 137 Fiduciary responsibility, 72, 77, Financial subcommittee, 183 Fire alarm mode (fiscal crisis), 29 Fixed costs, 10, 11, 13, 139 Footnetes to audited financial Form follows function, 131 Fragmented service delivery, 17 Funders (funding sources), 121 Funders, 4, 37, 38, 95, 153, 186, Funding source, 7, 83, 86, 125, 126, Fundraising professionals, 182 General partner, 101, 105

Going concern opinion, 167

Go-no go decision, 173
Goodwill (Industries), 72
Governance, 43, 69, 71–75, 77, 78, 85, 86, 96, 124, 159, 233
Governance structure, 193
Governing boards, 96
Government, 3
Government funders, 109, 217
Government officials, 4, 37
Grants, 43
Grassroots organizations, 123, 136
Great Society, 3
Group dynamics, 232

Hamburger University, 64 Hamel, Gary, 118 Hard labor markets, 12, 13 Hardware, 228 Health and human services, 119, 142 Health benefits, 155 Health care, 92, 137, 249 Health care and human services, 171 Health care benefits, 185 Health care delivery system, 96 Health care facilities, 236 Health care industry, 218 Health care network, 128 Health care system, 11 Health provider networks, 11 Health systems, 175, 183 Health, education and human services fields, 199 Holding company, 83, 92 Home health care, 92, 116, 142 Honorary trustees, 75 Hook (media), 200, 204 Horizontal applications (software), 95, 210 Hospital, 2, 10, 11, 14, 91, 92, 103, 116, 117, 137, 151, 161, 175,

183, 202

Hospital industry, 218
Hospital, municipal acute care, 201
Hospital, teaching, 201
Hospitality services, 118
Hostile takeover, 70, 110
Housing and Urban Development grants, 86
Housing developer, 105
Human resource management, 58, 80, 129

IBM, 5 Identity (organizational), 33–36, 80 Identity, 109, 153 Implementation, 130 Implementation phase, 217 Implementation phase of alliance, 244 Implementation planning, 42, 43, 45, 175–204 In rependent-living program, 143 Industrializers, conditions for, 116 Inflation, 14 Informal phase (of collaboration), Information exchange standards, 230 Information systems, 210, 246 Information technology (IT), 19, 20, 21, 59, 89, 90, 183 Inpatient psychiatric unit, 123 Inspection authority, 145 Institutional identification, 213 Insurance coverage, 129 Insurance coverage, lapsed, 165 Insurance premium, 29 Integrated health systems, 91, 201 Integrated service delivery, 17, 18 Integrated services, 21, 88 Integration, organizational, 22, 49, 50, 177, 205–218, 227, 246 Interest payments, 10 Intermediary organizations, 95, 116 Internal Revenue Service, 19, 48, 90, 105, 119, 126, 171 Investment management agreements, 163 Investments, 27, 29 Investor, 106, 218, 24

Job cuts, also job losses, 108
Job loss, 179, 212, 217
Job postings, 129
Joint funding pools, 41
Joint marketing, 246
Joint programming, 62, 63, 230
Joint purchasing, 56, 137, 230, 239
Joint purchasing agreements, 223, 224
Joint quality standards, 62, 63

Joint quality standards, 62, 63 Joint training program, 129 Joint venture, 22, 100

Labor markets, 11 Labor unions, 138 Labor-intensive, 10 Laws, 141 Lawsuit, 70, 106, 108 Leaders, 147 Leaders and leadership, 78, 114, 147, 173, 185, 189, 190, 192, 219, 241, Leadership team, 86 Leadership turnover, 242 Leases, 129 Legal aide nonprofit, 28 Lenders, 114, 195, 244 Liabilities, 69, 70, 163 Liabilities, unrecorded (hidden), 157, 160 Liability, 101, 167, 249 Librarians, 236 Licensed, 145, 171 Licensing, 235

Life cycles of nonprofit organizations, 12

Light green light, 147
Limited liability company (LLC), 69, 106, 247
Limited liability low income company (L3C), 106
Limited partner, 101, 105
Lines of credit, 29, 166
Liquidity, 27
Litigation, 129, 168
Loans, 13, 218
Local chapters, 113
Long tail (of foundation funding), 40
Loose confederation, 226
Loss, 99

M*A*S*H, 5 Malpractice, 168 Managed care organizations, 137 Management, 29, 58, 70, 80, 124, 126, 133, 152, 161, 166, 205, 233, 240 Management company, 68, 84, 85, 88, 96, 144 Management compensation policies, 125 Management consultants, 224 Management contracts, 68, 86, 88, 163 Management control, 133, 166 Management letters, 160 Management services organization (MSO), 83, 136 Management systems, 228 Management team, 80, 86 125, 132, 186, 109, 198, 210 Manager resistance, 216, 217 Managers, 2, 18, 36, 40, 43, 67, 72, 81, 89, 97, 128, 133, 135, 136, 139, 141, 144, 157, 172, 194, 196, 208, 216, 223, 226, 228, 231, 235,

243, 244

Managing general partner, 101 Market, 115, 244 (NEA), 236 Market penetration, 170 Market share, 195 (NLRB), 141 Net assets, 10, 168 Marketing and advertising, 84 Materiality standard, 128 New Deal, 3 McDonald's, 64 New York Times, 74 McLaughlin's Law, 185 Media, 179, 186, 200, 204 Mediation, 191, 192 Medicaid, 181 130, 154 Medical model, 119 Medicare, 18, 142 Memorandum of agreement Ocean Spray, 220 (MOA), 130Office Depot, 103 Memorandum of understanding (MOU), 130, 202 Mental health, 92 Mental health clinics, 12 Mental health organizations, 2 Merger myths, 107–111 Orphanage, 3 Merger types, merger by management company, 83–92 Merger types, merger of Palliative care, 119 equals, 79, 80 Merger types, takeover, 79 Metrics, 154 Microsoft, 132 Partners, 99 Middle management, 209, 216 Minority control, 145 Partnerships, 249 Mission, 43, 53, 80, 121, 155, 207, Payers, 249 211, 227, 244 Payroll, 166 Mission-based impact, 211 Payroll tax, 29 Monet, 81 Mount Sinai Medical Center, 74 Multicorporate integration, 91 143,207Multiple Listing Service (MLS), 249 Museum gift shop, 142 Museums, 2, 58, 71, 76, 115, 133, Physicians, 64, 183 142, 143Mutual discovery, 244 Polio, 3 Mutual learning, 156, 227, 229

National Endowment for the Arts National Labor Relations Board New York University, 74 Newsletter production, 224 Nondisclosure agreement (NDA), Nursing homes, 92, 115, 163

Opera company 164 Operations (level of collaboration), 48, 61, 64, 83, 219, 221, 222 Organization chart, 196, 227 Organized labor, 215 Overhead costs, 142

Parent (corporation), 68, 86 Parent/subsidiary relationship, 90 Parliamentary bodies, 235 Partnership, 47,51, 69, 99–106 Performing artists, 236 Personnel (compensation), Personnel issue, 208 Pharmacy supply companies, 163 Pledges receivable, 167 Pooling of interests, 69

Rescue mergers, 31

Post merger integration, 42, 43, 45, Residential school, 118 67, 79, 90, 147, 175 Resistance (to merger or Prahalad, C.K., 118 collaboration), 166 Pre-merger agreement, 130 Resistance, 212 Private foundations, 14, 37 Responsibility (level of Pro forma financials, 170 collaboration), 48, 49, 57–60, 66, Process-oriented alliance, 220, 247 219, 221, 246 Production management, 84 Restaurant phase (of collaboration), 148, 152 Productivity, 18, 20, 21 Professional development, 183 Restraint, 226 Profit, 99, 104, 169, 249 Retirement plans, 163 Revenue, 80, 107, 166, 182 Profit motive, 210 Profitability, 170 Risk, 64, 122 Profitable, 161 Roberts' Rules of Order, 235 Rule of 150, (see Dunbar's Program integration subcommittee, 184 Number) Program models, 4 Program related investment Salary, 143, 144, 207, 212 Scale, 58 (PRI), 43 Program staff, 35 Schoois, 103 Secretary of state, 171, 182, 201, Property management, 83, 84 Property ownership, 84 203 Property plant and equipment, 13 Senior management (team), 187, Prototypers, 116 195, 196, 197, 243 Publicly-held (traded) company, Senior services organization, 143 44, 70 Senior staff, 180 Publishing, 223 Serial integration, 67 Purchase price allocation, 69 Set-asides, 144 Purchasing committee, Shared administrative 184, 185 services, 58 Purchasing decisions, 66 Shared quality standards, 230 Purchasing practices, 185 Shared revenues, 249 Shared services building, 225 Shared training, 62 Quasi-public asset, 157 Quick victories, 221, 222, 239 Shared values, 34 Shareholders, 106 Recession (2007–2009), 18, 92, Single-asset corporations, 86 111, 251Social capital, 36 Social enterprise, 106 Regionalization, 7, 92 Reimbursement, 141 Social model, 119 Request for Proposal (RFP), 55, Social service providers, 222, 238 229, 236

Social services, 92, 171

Social sharing, 97 Socioeconomic class, 123 Soft labor markets, 12 Software, 228 Sole (corporate) member, 86 Sole proprietor, 106 Soviet Union, 19 Space planning, 185 Special assets, 119 Special education provider, 30 Split operations, 100 Staff members, 195, 236 Stakeholders, 18, 109 Staples, 103 Start dates (of merger), 67 Stock (shares), 110, 133, 161 Stock, 69, 70 Stock ownership, 133 Stock prices, 109 Stockholders, 38, 114 Strategy, 207 Subprime mortgage market, 251 Subsidiaries, 69, 84, 85, 88, 91 104, 134 Sunk costs, 211 Susan G. Komen for the Cure, 105 Symbolic level, 213 Symbols, 78 Symphony orchestras, 2, 75, 123, 142, 164

Tampa-Clearwater, 137
Task-oriented alliance, 95, 220, 228, 229, 244
Tax-exempt status, 19
Teachers, 236
Technical assistance providers, 95
Telecommunications, 224
Terms (board of directors), staggered, 75
Theater, 85
Theater company, 28, 83–85

Theater production, 83
Theaters, 183
Therapists, 236
Therapy services, 246
Thought leaders, 154
Titian, 76
Top-down decision-making, 66
Trade associations, 7, 95, 118, 233, 247
Trust, 19, 20, 63, 126, 127, 130, 153, 156, 176, 184, 246
Trustworthiness, 226

Unaudited financial statements, 160, 161 Unemployment claims, 172 Union(s), 139, 140, 177, 215,216Union resistance, 215 Union/management relations, 172 United Way, 38, 39, 59 Universities, 87, 161, 163, 209, 234 Unrelated Business Income Tax (UBIT), 161 Unrestricted funds, 249 Unrestricted income, 9 Utilization of services, 161

Valuation, 162, 168, 170
Values, 35, 121, 123, 124,
170, 220
Vendors, 163, 237, 238
Vertical alliance, 95, 96
Vertical applications
(software), 211
Vertically integrated merger, 96
Vice president, 197
VISA credit card, 220
Vision, 181, 207, 210, 227,
229, 242
Visiting nurse associations, 117

264 Index

Voluntary child welfare, 2 Volunteers, 6, 33

Wall Street, 149
Wall Street Journal, 108
Web sites, 119
Wholesaler, 56
Wide-area network (WAN), 230

Workers' compensation, 162, 172 Wrongful discharge, 168

Yale, 64 YMCA, 104

Zip code, 117

nttp://www.pbookshop.com?