

# Contents

Acknowledgments		xiii
Introduction		xv
Chapter 1	<b>A Valid Strategic Option for the Future</b> Government's Retreat	1
Chapter 2	<b>The Freestanding Nonprofit and Other Rugged Individualists</b> Why Nonprofit Services Are Fragmented: A Story A Nonprofit's Economics Are Part of Its Strategy	5
Chapter 3	<b>Logic of Integrated Service Delivery</b> Applications of Integrated Service Delivery Elements of Integration	17
Chapter 4	<b>Deciding to Collaborate</b> Rescue Mergers Merger from Strength Deciding to Collaborate as a Function of Larger Forces	25
Chapter 5	<b>Preserving Identity</b> Nonphysical Components of Organizational Identity What Is <i>Not</i> Part of "Identity"—and What Is	33
Chapter 6	<b>The Role of Funders</b> What Funders Can Do Funding Collaborations	37

	Models for Funding Collaborations	
	Quality Assurance through Foundations	
Chapter 7	<b>C.O.R.E. Continuum of Collaboration</b>	47
	Our Model	
	Applying the C.O.R.E.	
Chapter 8	<b>Economic-Level Collaboration</b>	53
	Sharing Information	
	Bidding Jointly	
	Joint Purchasing	
Chapter 9	<b>Responsibility-Level Collaboration</b>	57
	“Circuit Riders”	
	High-Integration Collaboration Models	
	A Cautionary Note	
Chapter 10	<b>Operations-Level Collaboration</b>	61
	Shared Training	
	Joint Programming	
	Joint Quality Standards	
Chapter 11	<b>Corporate-Level Collaboration: Merger</b>	65
	Authority Is Concentrated	
	Official Start Dates May Be Anticlimactic	
	What It Means to Merge	
	The Essence of a Nonprofit Merger	
	Advantages and Disadvantages of a Merger	
Chapter 12	<b>Models of Collaboration: Merger by Management Company</b>	83
	Structure	
	Control and Governance	
	Advantages of a Management Company	
	Disadvantages of a Management Company	
	Faulty Integration in a Management Company Model	
Chapter 13	<b>Models of Collaboration: Alliances</b>	93
	Structure	

Chapter 14	<b>Models of Collaboration: Partnerships with and between Nonprofits</b>	99
	Structure	
	Control and Governance	
	Special Considerations	
	Partnerships with For-Profit Companies	
	Limited Liability Companies	
Chapter 15	<b>Merger Myths</b>	107
	We Will Save Administrative Costs	
	There Will Be Massive Job Cuts	
	We Will Lose Our Identity	
	Let Us Figure Out the Structure First	
	Shhh	
	Only Failing Organizations Merge	
	Increase in Mergers Is a Product of an Economic Downturn	
Chapter 16	<b>First Steps</b>	113
	Geographic Proximity	
	Absence of a Permanent CEO	
	Nonoverlapping Markets	
	Industrializers and Prototypes	
	Compatibility of Services	
	Special Assets	
	Role of Culture	
	Role of Class	
	Quick Culture Check	
	Building Trust	
	Seeds of Trust: Disclosure, Consultation, and Collaboration	
Chapter 17	<b>Merger or Alliance? How to Decide</b>	131
	Corporate Control	
Chapter 18	<b>First Phase of a Merger: Feasibility Assessment</b>	147
	Informal Phase of a Collaboration	
	Role of Consultants	
	Form a Collaboration Committee	

	Why Due Diligence?	
	What Is a Due Diligence Investigation?	
	Governance	
	Finances	
	Assets	
	Liabilities and Obligations	
	Some Financial Red Flags	
	Valuations	
	Carrying Out the Valuation	
	Pro Forma Financials, Including Cash Flows	
	Regulatory Filings	
	Human Resources Information	
	Assess the Feasibility	
Chapter 19	<b>Second Phase of a Merger: Implementation Planning</b>	175
	Form Subcommittees of the Collaboration Committee	
	Internal Communication	
	External Communication	
	Some Sample Collaboration Committee Structures	
	Who Will Be the Boss?	
	Some Tools to Accomplish a Leadership Transition	
	Once the Selection Is Made . . .	
	Creating the Formal Agreement	
	Merger Announcement (Create a Splash)	
Chapter 20	<b>Third Phase of a Merger: Integration</b>	205
	Time Required for Integration	
	Common Sources of Resistance	
Chapter 21	<b>The Seven Stages of Alliance Development</b>	219
	Categories of Alliances	
	Seven Tasks of Alliance Development	
	Task One: Initiate, Explore, and Analyze	
	Task Two: Synthesize and Plan	
	Task Three: Establish Shared Objectives	
	Task Four: Develop Working Committee Structure	

Task Five: Gain Quick Victories  
Task Six: Secure Institutionalize Buy-in  
Task Seven: Implement and Evaluate

Chapter 22 <b>Postscript and Conclusion</b>	251
About the Author	253
Index	255

<http://www.pbookshop.com>

<http://www.pbookshop.com>