

## *Integration Checklist*

There are ten principal areas to address in the nonprofit merger integration process:

1. **Board:** Board integration is the process of developing a new, effective board of directors from the boards of the pre-merger organizations. It involves not only the identification of new roles and responsibilities, but the creation of a new cultural identity and a sense of shared ownership for the newly merged organization.
2. **Management:** Management integration involves the determination of key leadership positions as well as the creation and articulation of a new managerial culture and philosophy for the new organization. This includes setting up an effective management team and the structures to support that team in its work.
3. **Financial:** Financial integration includes the consolidation of all financial records and systems including accounting, budgeting, payroll, purchasing, and inventory tracking. This may require assessing and choosing from systems already in use or exploring and adopting new ones.
4. **Program:** Program integration may include the melding of some programs and the development of linkages between and among other programs. It may also entail closing a program or finding it another home if it no longer fits the mission or strategy of the merged organization.
5. **Staff:** Staff integration involves the determination of the appropriate staff roles, size, and structure for the new organization as well as the creation of clear goals and a shared culture. A well-integrated staff will perform well as a healthy working team in support of the organization's mission.
6. **Human Resources** (including Volunteer Management, as appropriate): Human resources integration includes the merging of human resources philosophies, policies, procedures, and programs to best support the new organization's mission. The primary goal is to promote effectiveness, cohesiveness, and safety.
7. **Fundraising:** Fundraising integration entails combining all sources of contributed income while respecting donor restrictions. It also includes merging of all donor databases, management systems, proposal writing processes, case statements, campaigns, etc.
8. **Communications:** Communications integration includes alignment of all systems that facilitate the exchange of ideas and information, both internally and with external stakeholders. This includes marketing communications and may entail branding the organization's new, merged identity.
9. **Information Technology:** Technology integration includes both the integration of the systems themselves (i.e. the hardware, software, and processes) and the training of all staff on how to use and take full advantage of the organization's technological resources.
10. **Facilities:** Facilities integration may entail reduction or consolidation of space and facilities, purchase or lease of new facilities, remodeling or reconfiguration of facilities, and/or relocation of departments, programs, and people. The focus is to ensure best and most effective use of available space and facilities.