

3. Building the Future: Integration

3.3 Sample Integration Plan

Board													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Establish board integration committee	Lead: Bd Pres. Team: -												
Identify desired outcomes for board integration	Lead: Bd Pres. Team: -												
Plan and convene first joint board meeting	Lead: Bd Pres. Team: JJ												
Establish schedule for future board meetings	Lead: Bd Pres. Team: -												
Review each board's prior practices, responsibilities, job descriptions	Lead: KG Team: TR												
Establish committee structure and job descriptions for new board	Lead: SV Team: KG, LM												
Survey board members re: interests, strengths	Lead: Bd Pres. Team: -												
Assess board composition; determine needed skills/characteristics	Lead: SS Team: OW												
Finalize board committee assignments	Lead: Bd Pres. Team: -												
Articulate communication practices for the board, and with the ED/CEO	Lead: JJ Team: OW												
Create a short-term fund development plan	Lead: Treas. Team: SS, LM												
Approve a budget for merged organization	Lead: Bd Pres. Team: BN												
Plan retreat for new board	Lead: Bd Pres. Team: JJ, KG												
Provide training for all members regarding their role as ambassador	Lead: Consult. Team: Bd Pres												
Provide training for all members regarding fundraising responsibilities	Lead: Treas. Team: AP												
Develop a board member recruitment plan	Lead: SV Team: KG, LM												
Create fundraising plan for merged organization	Lead: Treas. Team: SS, LM												
Develop orientation program for incoming board members	Lead: KG Team: TR												
Develop board handbook	Lead: JJ Team: OW												
Ensure all current board members have been through orientation	Lead: SS Team: -												
Create and implement a board self-assessment process	Lead: MR Team: AP												
Work with management to establish an evaluation process for the organization	Lead: Bd Pres. Team: CEO												
Develop and pursue a strategic planning process	Lead: Bd Pres. Team: CEO												

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Communication/Marketing													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Identify all pre-merger communication staff and resources	Lead: Mkt Dir Team: Mkt staff												
Design marketing and communication functions in new organization	Lead: Mkt Dir Team: CEO												
Draft initial marketing plan	Lead: Mkt Dir Team: Mkt staff												
Define an overall marketing strategy	Lead: Mkt Dir Team: Mkt staff												
Identify required/desired marketing materials	Lead: Mkt Dir Team: Mkt staff												
Draft a talking-points document	Lead: Mkt Dir Team: CEO												
Designate a spokesperson(s)	Lead: CEO Team: -												
Establish guiding principles for communications	Lead: Mkt Dir Team: -												
Create necessary Q&A documents	Lead: Mkt Dir Team: -												
Draft, secure approval for, and finalize messages	Lead: Mkt Dir Team: Mkt staff												
Design and plan distribution schedule for integration newsletter	Lead: Mkt Dir Team: -												
Create and/or update website	Lead: Mkt Dir Team: IT Dir												

Evaluation													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Review integration plan and accomplishment of activities	Lead: CEO Team: -												
Conduct check-in meeting with senior management team	Lead: CEO Team: -												

Facilities													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Gather input on space needs from staff, clients, other relevant stakeholders	Lead: Consult Team: -												
Determine current and intermediate space needs	Lead: Consult Team: CEO, CFO, HR Dir												
Complete a facilities audit for each pre-merger org	Lead: Consult Team: -												
Bring facilities recommendations to CEO, Integration Team, and board as appropriate	Lead: Consult Team: -												
Finalize plan and budget for meeting space needs	Lead: Consult Team: -												

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Finance													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Determine the new organization's fiscal year	Lead: CEO Team: CFO, Bd Treas.	(prior)											
Review maintenance schedules for buildings, equipment (for budgeting)	Lead: CFO Team: --	(prior)											
Define optimal staffing for finance function	Lead: CFO Team: HR Dir												
Select/adopt a payroll system	Lead: CFO Team: CEO												
Plan for necessary hiring/reallocation of staff	Lead: CFO Team: HR Dir												
Examine/compare pre-merger accounting systems	Lead: CFO Team: --												
Refine the consolidated budget created during negotiations	Lead: CFO Team: CEO, Bd Treas.												
Define features of a desired accounting system	Lead: CFO Team: --												
Consolidate banking and investment accounts	Lead: CFO Team: --												
Select accounting system	Lead: CFO Team: --												
Develop a petty cash policy	Lead: CFO Team: Fin staff												
Develop purchasing policies	Lead: CFO Team: Fin staff												
Adopt a unified format for financial statements, circulate to board	Lead: CFO Team: CEO, Bd Treas.												
Train staff/board on new financial systems/procedures	Lead: CFO Team: Board												
Notify clients and vendors of any change to billing address/procedures	Lead: CFO Team: Fin staff												

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Fundraising													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Train staff/board on new fundraising systems/procedures	Lead: Dev Dir Team: IT Dir												
Make recommendations for new databases and donor systems to board	Lead: Dev Dir Team: --	(prior)											
Review/analyze technology used for fundraising management	Lead: Dev Dir Team: IT Dir												
Review pre-merger fundraising staffing	Lead: Dev Dir Team: CEO												
Create plan to communicate with current donors	Lead: Dev Dir Team: CEO, Board												
Define optimal staffing for fundraising function	Lead: Dev Dir Team: CEO												
Plan for necessary hiring/reallocation of staff resources	Lead: Dev Dir Team: CEO, HR Dir												
Review/analyze donor databases	Lead: Dev Dir Team: IT Dir												
Assess level/types of pre-merger participation in fundraising efforts	Lead: bd Pres. Team: Dev Dir, CEO												
Create integrated gift acknowledgement and recognition processes	Lead: Dev Dir Team: <u>Dy</u> staff												
Create updated case statement for the new org	Lead: Dev Dir Team: CEO												
Establish fundraising budget for the new org	Lead: Dev Dir Team: Bd com												
Establish integrated fundraising plan with calendar	Lead: Dev Dir Team: <u>Dy</u> staff												
Adopt unified policies and procedures for fundraising	Lead: Dev Dir Team: CEO, Board												
Finalize and adopt fundraising plan	Lead: Bd Pres. Team: CEO, Board												

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Human Resources													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Review all layoff decisions and policies, ensure smooth transitions	Lead: HR Dir Team: CEO												
Complete an HR audit for each pre-merger organization	Lead: HR Dir Team: --												
Develop systems/resources for ongoing staff training and development	Lead: HR Dir Team: HR staff												
Integrate pre-merger personnel files	Lead: HR Dir Team: --												
Define optimal staffing for HR function	Lead: HR Dir Team: --												
Train staff on new HR systems/procedures	Lead: HR Dir Team: HR staff												
Create and disseminate new personnel policies	Lead: HR Dir Team: HR staff												
Develop performance management and evaluation systems	Lead: HR Dir Team: --												
Develop and put in place a new compensation and benefits system	Lead: HR Dir Team: CEO												
Arrange meetings with staff (group, individual) to explain compensation system	Lead: HR Dir Team: HR staff												

Information Technology													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Ensure that all staff can immediately communicate via phone, email	Lead: IT Dir Team: IT staff												
Identify the technology needs of the new org	Lead: IT Dir Team: IT staff												
Arrange focus groups to gather input on technology needs/potential	Lead: IT Dir Team: IT staff												
Review pre-merger IT staffing	Lead: IT Dir Team: IT staff												
Define optimal staffing for IT function	Lead: IT Dir Team: CEO												
Draft recommendations for integration of hardware, software, systems	Lead: IT Dir Team: --												
Gather feedback on recommendations	Lead: IT Dir Team: --												
Plan for necessary hiring/reallocation of staff	Lead: IT Dir Team: HR Dir, CEO												
Finalize plan for integration of hardware, software, systems	Lead: IT Dir Team: --												
Develop and publicize training on any new hardware, software, systems	Lead: IT Dir Team: IT staff												
Ensure feedback mechanisms are in place for ongoing tech support needs	Lead: IT Dir Team: --												

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Management/Senior Management Team (SMT)													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Establish a regular SMT meeting time and list of must-have agenda items	Lead: CEO Team: SMT												
Articulate the integration-related duties and responsibilities of the SMT	Lead: HR Dir Team: SMT												
Articulate the general duties and responsibilities of the SMT	Lead: HR Dir Team: SMT												
Define a shared managerial culture for the new organization	Lead: CEO Team: SMT												
Identify specific work required to achieve desired managerial culture	Lead: CEO Team: SMT												
Create process to monitor the integration plan	Lead: CEO Team: Int team												
Articulate processes, policies, and procedures around conflict resolution	Lead: HR Dir Team: SMT												
Identify management positions needed in the merged organization	Lead: HR Dir Team: --												
Develop recruitment plan for any remaining senior management positions	Lead: HR Dir Team: --												
Create process to fill open positions	Lead: HR Dir Team: --												
CEO work with each manager to create a personal development and training plan	Lead: CEO Team: --												
Have CEO create own development plan in partnership with the board	Lead: CEO Team: Board												
Create a development and training plan for each manager	Lead: CEO Team: SMT												
Work with Integration Team to evaluate integration progress (ongoing)	Lead: CEO Team: Int team												

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Overall													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Coordinate Integration Team activities with the Board Integration Committee	Lead: Int team Chair Team: --												
Plan, convene first meeting of Integration Team	Lead: Int team Chair Team: --												
Clarify the team's role, goals, channels of communication	Lead: Int team Chair Team: CEO, Int team												
Decide how to create the first draft of an integration plan	Lead: CEO Team: Int team Chair												
Designate sub-teams or working groups for key integration areas	Lead: Int team Chair Team: CEO, Int team												
Articulate desired outcomes for each integration area	Lead: Int team Chair Team: CEO, SMT												
Design process for gathering and incorporating feedback on the plan	Lead: HR Dir Team: Int team Chair, LC												
Design process for making the integration plan a "living document"	Lead: HR Dir Team: Int team Chair, LC												
Generate first draft of an integration plan	Lead: Int team Chair Team: SS, LC, Int team												
Distribute first draft of integration plan for management, staff for fleshing out	Lead: Int team Chair Team: CEO, IJ												

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Program													
Activity	Lead/Team	Time Frame <i>(indicate dates when applicable)</i>											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Gather and compare information on all pre-merger programs	Lead: Prog Dir Team: BB												
Identify any obstacles/issues likely to arise in program integration	Lead: Prog Dir Team: BB												
Identify necessary skills and competencies for program management	Lead: CEO Team: SMT												
Identify positions that need to be filled	Lead: Prog Dir Team: --												
Identify any programs needing to be closed or moved elsewhere	Lead: Prog Dir Team: BB, CEO												
Identify programmatic strengths, weaknesses, assets, and liabilities	Lead: Prog Dir Team: BB, CEO												
Match current (pre-merger) employees to positions where appropriate	Lead: CEO Team: HB												
Gather input on proposed program design from SMT and other stakeholders	Lead: Prog Dir Team: BB, SMT												
Design the process for integrating, closing, or moving each program	Lead: Prog Dir Team: --												
Incorporate feedback on program design	Lead: Prog Dir Team: BB												
Create process to fill open positions	Lead: Prog Dir Team: HR Dir												
Finalize recommendations for program design	Lead: Prog Dir Team: BB, CEO												

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Staff													
Activity	Lead/Team	Time Frame (indicate dates when applicable)											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Identify positions still needed within the organization	Lead: HR Dir Team: CEO												
Address job losses with remaining staff: clarify extent, timing, impact	Lead: CEO Team: HR Dir												
Plan a farewell ritual for departing employees	Lead: HR Dir Team: CEO												
Establish specific feedback mechanisms for staff questions/comments/concerns	Lead: HR Dir Team: CEO												
Identify one or more integration exercises that can be done at staff meetings	Lead: HR Dir Team: --												
Establish regular staff meeting times and must-have agenda items	Lead: CEO Team: --												
Delegate responsibility for filling necessary positions	Lead: CEO Team: --												
Clarify roles for all staff: reporting relationships, function, authority	Lead: HR Dir Team: --												
Identify opportunities to be explicit in acknowledging staff contributions	Lead: HR Dir Team: CEO												
Institute a plan to celebrate milestones, accomplishments at the department/work group level	Lead: HR Dir Team: Prog Dir												
Communicate regularly about integration progress	Lead: CEO Team: SMT												

Volunteers													
Activity	Lead/Team	Time Frame (indicate dates when applicable)											
		Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Create mechanism for volunteer involvement in integration process of volunteer programs	Lead: Vol Coor Team: --	(prior)											
Establish plan for communicating with volunteers about integration process and how changes will impact them	Lead: Vol Coor Team: --	(prior)											
Clarify the volunteer needs of the new org	Lead: Vol Coor Team: --												
Identify any changes in the volunteer program	Lead: Vol Coor Team: --												
Design roles and assignments for volunteers in the new org	Lead: Vol Coor Team: --												
Create job descriptions for volunteer positions	Lead: Vol Coor Team: --												
Clarify roles for all volunteers: reporting relationships, function, authority	Lead: Vol Coor Team: --												
Establish policies for volunteer supervision, evaluation, and recognition	Lead: Vol Coor Team: --												
Develop a volunteer recruitment plan	Lead: Vol Coor Team: --												
Create volunteer policies manual for the new org	Lead: Vol Coor Team: --												
Develop a volunteer orientation and training manual/process	Lead: Vol Coor Team: --												