

Merger and Alliance Toolkit

1. Getting Ready: Assessment

1.2a Motivations Worksheet

In practice, the motivation to consider a strategic partnership or merger may stem from several factors, and these factors may overlap to some degree. This worksheet will help you explore what motivates your organization to consider a merger or partnership. (Note that motivators are more general in nature than the specific outcomes you desire from the merger or partnership. These are covered in the next worksheet.)

What goals, or desired outcomes, does your organization seek to achieve through a partnership

with one or more other organizations? **Check all that apply.**

- We want to expand our programming – either the range/scope of programs offered, or the numbers served
- We want to consider opportunities to expand our geographic scope; i.e. expand our programs into new communities/sites.
- We want to improve our outcomes – get better results for those we serve or otherwise increase our impact.
- We want to reduce operating/administrative costs by sharing those with others
- We want to develop or access higher level operating, administrative expertise
- We want to develop or access higher level programmatic expertise
- We want to develop a stronger/more effective “voice”
- Other (describe):

What other motivators, or driving forces, are leading your organization to consider a partnership?

Check all that apply.

- Environmental shifts (e.g. changing demographics) require changes in program mix or program delivery
- Financial challenges/pressures
- Competition for funding, staff, donors and/or clientele
- Challenges in meeting external standards and/or requirements (e.g., in contracting, or evaluation)
- Our Executive Director is retiring/departing, and this is an opportunity to explore leadership options
- We have some external pressure (from a funder or parent organization)
- Our board’s size and/or level of involvement has dropped and/or we’ve had difficulty recruiting board members with the skill sets needed.
- Other (describe):