

1. Getting Ready: Assessment

1.3 Discussion Guide

Readiness: Are you ready for a partnership?

Before entering into any effort to form a strategic partnership with another organization, nonprofit leaders are wise to undertake a systematic assessment of their organization's readiness. Consider these readiness questions:

- What has been your past experience with partnerships, any? What was that experience like? What did you learn from it?
- Do you know of other mergers—successful or unsuccessful? Do these stories help clarify what a merger means or how it could be implemented? Do they inspire greater openness to potential partnerships, or greater trepidation?
- Does the board and CEO/Executive Director have a strong relationship? Is there a strong basis of mutual trust, communication, etc.?
- Is your board generally amenable, or at least open, to the idea of partnership? Can the board speak with one voice, or does it tend to split in factions? Do members resolve differences effectively and work in a unified way toward a chosen strategy?
- Is your organization currently facing a crisis? If so, will you be able to resolve this crisis before entering into partnership negotiations with another organization, or will it affect the process?
- Is your organization growth-oriented? Merger almost always entails growth and may even be used as a strategy for growth.
- Does the idea of this partnership or merger raise concerns about individual self-interest or organizational autonomy?
- Does your organization, especially its lead staff and key board members, have the time to devote to a rigorous and time-consuming partnership exploration/negotiation process?

We recommend that you walk through these questions with representatives from the board and staff to seek various perspectives from within your organization. This will not only make you more aware of your strong and weak points, it will contribute to the development of common understandings necessary for your team to successfully pursue a partnership or merger.