

Merger Readiness + Integration Checklist

A PRACTICAL TOOL TO GUIDE NONPROFIT AND MISSION-DRIVEN LEADERS CONSIDERING COLLABORATION OR MERGER.

1. Strategic Rationale – Why Merge?

- Have we defined the strategic reason (survival, growth, impact expansion)?
- Does 1 + 1 realistically equal 3 for mission impact?
- Are both boards aligned on the purpose and desired outcomes?

2. Financial + Funder Alignment

- Do we understand organizations' financial health (cash flow, reserves, liabilities)?
- Have key funders been consulted or signaled support?
- Can we clearly articulate the financial case for the merger?

3. Mission, Programs + Impact Data

- Do we have aligned outcomes and data to compare program effectiveness?
- Have we identified duplication vs. complementary strengths?
- Are we willing to let go of programs that don't serve combined impact?

4. Culture + People Integration

- Have we assessed cultural compatibility (decision-making, norms, leadership style)?
- Have we prepared to overcommunicate early and often?
- Are we addressing employee concerns (roles, compensation, benefits, security)?

5. Operations + Infrastructure

- Have we reviewed policies and procedures for alignment?
- Is there clarity on governance and leadership structure post-merger?
- Do we have a detailed integration timeline with milestones?

6. Communication + Narrative

- Have we defined the message for stakeholders (staff, clients, funders, media)?
- Are we controlling the narrative before rumors fill the gap?
- Have we prepared for difficult conversations (including potential layoffs)?

7. Post-Merger Success Measures

- Have we defined what success looks like at 12 and 24 months?
- Are new impact metrics established for the combined organization?
- Is there a plan to assess culture health and staff engagement?



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