

▶ STRATEGIC ◀ RESTRUCTURING



BIBLIOGRAPHY FOR NONPROFIT STRATEGIC RE-STRUCTURING

This is an excerpt from a 2009 publication: Strategic Restructuring , a joint presentation of Jean Butzen, Mission Plus Strategy and BoardStar. For a complete copy of the booklet contact Jean Butzen at: Butzen@comcast.net, or BoardStar at www.BoardStar.org.

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Strategic Restructuring

April 8, 2009 | Time: 10:30

Some nonprofit leaders equate strategic restructuring only with mergers, but additional examples include partnerships, joint ventures, management service organizations, and parent corporations. Where do Boards begin when considering restructuring options? Pat Wyzbinski of the Nonprofit Management Fund talks with **Jean Butzen** about questions a Board can ask regarding the sustainability of the organization's business model, changes in revenue sources, staff talent, quality of services, potential duplication of programs, and other critical factors. Jean Butzen is the president of Mission Plus Strategy Consulting, specializing in

growing nonprofit social value through strategic restructuring.

Merger Integration

April 22, 2009 | Time: 8:04

One of the most difficult things for a nonprofit leader to learn is how to manage transitions and overcome fears that often accompany organizational change. Pat Wyzbinski of the Nonprofit Management Fund and **Mary Beth Malm** discuss the dynamics associated with integrating several boards and staffs into a single "new" entity. Mary Beth has served as Executive Director for the Girl Scouts of Greater Milwaukee and was recently involved in the integration of seven Girl Scout councils in the Greater Chicago and Northwest Indiana area.

MERGER – Part 1

16 January 2008 | Time: 8:53

Anna Pepelnjak was Board President of the Interfaith Caregiving Network when the organization was approached by Retired and Senior Volunteer Program Board leaders about the possibility of an alliance. Pat Wyzbinski of the Nonprofit Management Fund talks with Anna Pepelnjak about the Boards' involvement in the process that led to a merger and the resulting organization, Interfaith Senior Programs.

MERGER - Part 2

30 January 2008 | Time: 8:53

The time and expense involved in making a merger work can surprise even the most experienced nonprofit leader. Interfaith Caregiving Network and the Retired and Senior Volunteer Program merged in 2007 to form Interfaith Senior Programs. In her discussion with Pat Wyzbinski of the Nonprofit Management Fund, **Kathy Gale** provides the Executive Director's perspective about integrating two organizations' staffs, procedures, systems, and cultures as well as reactions to the merger by donors and the general community.

Alternative Structures: Consortium

July 4, 2007 | Time: 8:52

Nonprofit organizations are structured in many different ways, some of which result in unusual Board composition and inherent conflicts of interest. Milwaukee Environmental Consortium Board Chair **Lynn Broaddus** talks with Pat Wyzbinski of the Nonprofit Management Fund about the challenges and successes of a consortium governed by a Board comprised solely of nonprofit staff from environmental organizations.

Bibliography and Resources

There are many books, articles, and on-line resources about the topic of nonprofit strategic restructuring; each is geared for slightly different uses.

BOOKS (alphabetical, by author)

Arsenault, Jane, *Forging Nonprofit Alliances*, Jossey-Bass Publishers, 1998. This is the best book on nonprofit strategic restructuring currently in existence. It is a wonderful book which provides a clearly written, comprehensive overview of the four types of nonprofit strategic restructuring: joint venture partnerships, management service organizations, parent corporations, and mergers. Ms. Arsenault's book contains additional resources including a wonderful section on organizational culture, integration, a program analysis tool called the MacMillan Matrix, and other valuable resources.

Austin, James, *Meeting the Collaboration Challenge Workbook*, Jossey-Bass. This award-winning book lays out how strategic partnerships can advance nonprofit and for-profit objectives, and walks the reader through the process of creating them by emphasizing the strengths that organizations bring to the table. This is a workbook with a companion videotape.

BoardSource, *Managing Change: Lessons Learned from Nonprofit Leaders*. This is a booklet offered by Board Source, offering insights from 16 Board chairs and CEO's who have gone through organizational change, and what they would do differently if they had it to do over again. <http://www.boardsource.org/Knowledge.asp?ID=2.1119>

Hoskings, Linda, and Angelica, Emil, *The Fieldstone Nonprofit Guide to Forming Alliances* Fieldstone Alliance. This workbook argues for less complex forms of alliances between nonprofit organizations and provides step-by-step guidance on how to create them. <http://www.fieldstonealliance.org/productdetails.cfm?SKU=069466>

LaPiana, David, *The Nonprofit Mergers Workbooks, I & II*, Amherst H. Wilder Foundation, 2004. Workbook I provides a step-by-step description of how to do a merger. Workbook II, is a step-by-step process for unifying the two organizations after a merger. These books are classics in the field of nonprofit strategic restructuring. <http://www.amazon.com/Nonprofit-Mergers-Workbook-Considering-Negotiating/dp/0940069210>

Mattessich, Paul W., Murray-close, Marta, and Monsey, Barbara R., *Collaboration: What Makes It Work*, Fieldstone Alliance. This book identifies the 20 success factors for collaborations (take the test on-line), and suggestions for using the factors successfully for your own collaboration. (Fieldstone also has a very long list of other references you can access at this link.) <http://www.fieldstonealliance.org/productdetails.cfm?SKU=069326>

McLaughlin, Thomas A., *Nonprofit Mergers and Alliances: A Strategic Planning Guide*, John Wiley & Sons, 1998. An overview of the types of nonprofit alliances, the issues involved in developing each type, and the things to watch out for. Along with Arsenault's and LaPiana's books, a classic in the field.

Winter, Michael and Ray, Karen, *Collaboration Handbook: Creating, Sustaining, and Enjoying the Journey*, by Fieldstone Alliance. This is a how-to book for creating successful collaborations. The book outlines the steps to achieving success, and also how to address the roadblocks along the way.

<http://www.fieldstonealliance.org/productdetails.cfm?PC=4>

Ray, Karen, *The Nimble Collaboration: Fine-Tuning Your Collaboration for Lasting Success*, Fieldstone Alliance. This is a follow-up to *Collaboration Handbook*, focusing on the second stage of development for collaborations. In this book the author introduces the three R's: results, relationships, and resiliency and discusses detailed cases studies as examples. <http://www.fieldstonealliance.org/productdetails.cfm?SKU=069288>

Jean Butzen
Mission Plus Strategy Consulting

Mission + Strategy = Social Value

(847) 866-0197 Butzen@comcast.net

www.MissionPlusStrategy.com

Articles and Blogs

(Available on Boardsource, for members only:)

- Butzen, Jean. *Merge to Advance Mission*, BoardSource, 2006. The story of one CEO's decision to merge her small nonprofit with a much larger entity.
- Davis, Emmeus. *Merge Right*, Boardsource, detailing the merger of two New Hampshire nonprofit housing corporations.

Mergers are Radical Re-Structuring Methods, A Topic Paper for Boardsource

Buono, A.F., and Bowditch, J.L. Lewis. *When Cultures Collide: The Anatomy of a Merger*, *Human Relations*, 1983, 38(5), 447-500.

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Butzen, Jean. A blog written by Jean Butzen, a strategic restructuring facilitator with Mission Plus Strategy Consulting, highlighting people, organizations, and research breaking on the topic of nonprofit strategic restructuring today. Also, the site contains links to studies, books, and articles related to nonprofit strategic restructuring. www.MissionPlusStrategy.com

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Fish, A.B. *How to Make a Merger Work*, *Fortune Magazine*, Jan. 1994, pp. 66-69.

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The Lodestar Foundation (www.lodestar.org), *The Collaboration Prize*

The Bridgespan study (www.Bridgespan.org), can be found at: <http://www.bridgespan.org/Nonprofit-M-and-A.aspx>

Vergara Lobo, Alfredo, Masaoka, Jan, and Smith, Sabrina, L. *The M Word*, Compass Point Nonprofit Services. This 40 page document targets Board Directors and their unique decision making role in nonprofit mergers and explaining the merger process from the Board member's perspective.

<http://www.blueavocado.org/sites/default/files/The%20M%20Word%20A%20Board%20Members%20Guide%20to%20Mergers%20from%20CompassPoint.pdf>