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Workbook Part I  
The Leaders  
Guide To  
Considering  
Negotiating And  
Executing A  
Merger

# **The Nonprofit Mergers Workbook Part I The Leaders Guide To Consideri**

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# **ng Negotiating And Executing A Merger**

**How to manage tech support (and keep your sanity!) One day you unjammed the printer and**

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**saved the day.**

**But now,**

**somehow, all**

**technology**

**resources have**

**become your**

**responsibility!**

**The Accidental**

**Techie shows you**

**how to create a**

**support system**

**that will help**

**your**

**organization use**

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Guide To  
Considering  
Negotiating And  
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technology more effectively and make your day-to-day life less hectic. Step-by-step guidance to creating an effective support system

This hands-on guide walks you through five projects that, when completed,

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Guide To  
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**will give you a  
comprehensive  
and usable  
support system  
for conducting a  
technology  
inventory,  
assessing and  
supporting  
staff, assessing  
and buying  
technology,  
protecting your  
organization**

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from disasters  
and data loss,  
and managing  
your role. You  
don't have to  
tackle the  
projects all at  
once or in any  
particular  
order. Dive in  
where it makes  
sense for you.  
""Techie Tools""  
make this guide

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even more useful  
You'll find  
ready-to-use  
templates,  
worksheets, and  
sample policies;  
135 resources on  
topics such as  
funding,  
discussion  
groups,  
application  
service  
providers, web

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**development, and  
donor management  
software; a  
security policy  
checklist; steps  
for creating a  
database that  
gives you the  
reports you  
need; and a  
glossary of  
terms every  
techie should**



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know. How to get  
technology  
funding. A  
special chapter  
on funding  
reveals five  
questions most  
fundors ask to  
judge technology  
requests, and  
gives you tips  
for creating a  
compelling  
request. Build

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management  
support for your  
work Many  
accidental  
techies face the  
challenge of  
influencing  
major  
organizational  
policies and  
procedures  
without real  
authority to do  
so. Board

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Workbook Part I  
This book to  
understand and  
support your  
work.  
Ultimately,  
better managed  
technology leads  
to better  
services.  
Whether you're  
new to all this  
or a veteran,

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The Accidental  
Workbook Part I  
The Leader's  
Guide To  
Considering  
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Executing A  
Streetsmart  
Financial Basics  
for Nonprofit  
Managers, Third  
Edition "Tom  
McLaughlin is a  
proven master at

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**making the  
daunting  
concepts of  
nonprofit  
financial  
management clear  
and engaging.  
This book is a  
superb  
introduction for  
new nonprofit  
executives,  
board members,  
and students. It**

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is also an  
excellent  
refresher and  
reference for  
those of us who  
have been around  
the nonprofit  
sector for a  
while. It is  
well written,  
concise, and  
thought  
provoking." –J.  
Gregory Dees,

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Professor of the  
Workbook Part I  
Practice of  
Social Leaders  
Entrepreneurship  
and Nonprofit  
Management at  
Duke  
University's  
Fuqua School of  
Business, and  
coauthor of  
Enterprising  
Nonprofits and  
Strategic Tools

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The London  
Guide To  
Considering  
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Merge  
for Social  
Entrepreneurs "A  
very practical  
guide to  
understanding  
and managing the  
finances of a  
nonprofit  
organization. As  
nonprofits  
strive for  
greater  
accountability,  
Tom McLaughlin's



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**real-world  
examples and  
accessible style  
make this book  
indispensable  
for nonprofit  
executives,  
managers, and  
board members at  
organizations of  
any size."**

**—Gordon J.  
Campbell,  
President and**

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CEOs, United Way  
of New York City

"Tom Leaders

McLaughlin's  
powerful book is  
far more than a  
useful tool. It  
provides the  
philosophical  
approach to  
instill strong  
stewardship and  
future viability  
to those in the

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world of  
nonprofits. He  
takes apart the  
complex issues  
of nonprofit  
stewardship just  
as Einstein  
translated  
relativity into  
a simple  
equation. Purely  
masterful." –Jim  
Mellor, Senior  
VP, Chief

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The USA Note: CD-  
ROM/DVD and  
other  
supplementary  
materials are  
not included as  
part of eBook  
file.**

**You've completed  
the merger  
agreement. Now,  
how do you make**

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the merger work?  
Workbook Part I  
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Mergers Part II  
helps you create  
a comprehensive  
plan to achieve  
integration. It  
addresses large,  
strategic issues  
as well as small  
practical ones.  
Integration  
issues and how  
to handle them

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Section I: Going  
the Distance

Workshop Part I  
The Distance  
provides a broad  
view of  
integration, its  
challenges, and  
how to meet  
them. Topics  
include the  
basic tenets of  
organizational  
change; what  
success looks  
like in a well-

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**implemented  
merger; the  
purpose and  
content of an  
integration  
plan; how to  
address people  
issues through  
leadership and  
planning; and  
the relationship  
between  
effective  
leadership,**

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effective  
Workbook Part I  
communication,  
The Leaders  
and their  
Guide To  
combined  
Considering  
contribution to  
Negotiating And  
integration  
Executing A  
success. How to  
Merge  
create a useful  
integration plan  
Section II:  
Creating an  
Integration Plan  
takes you step-  
by-step through



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**this essential  
process. You'll**

**Learn about**

**integration of**

**boards,**

**cultures,**

**management,**

**staff and**

**volunteers,**

**programs,**

**communications**

**and marketing,**

**and systems--one**

**by one, in**

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**detail; the  
steps needed to  
create each  
section of the  
plan; common  
challenges,  
roadblocks, and  
crises that will  
arise, and how  
to respond when  
they do; and  
processes,  
procedures, and  
interventions**

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**likely to be  
most helpful and  
necessary.  
Software helps  
you create an  
organized plan  
Included with  
the book is a CD-  
ROM with a  
detailed  
integration plan  
template. Use it  
to keep your  
planning**

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organized and on  
Workbook Part I  
track. This  
The Leader's  
useful guide  
Guide To  
also includes  
sample  
Considering  
integration  
Negotiating And  
plans,  
Executing A  
worksheets,  
Merger  
checklists, and  
tips and quotes  
from leaders of  
merged  
organizations.  
Nonprofit

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Mergers Part II  
Workbook Part I  
is a must-read  
for anyone  
considering,  
embarking on, or  
just completing  
a merger!  
Play to Win  
offers nonprofit  
leaders the help  
they need  
to develop their  
organization's  
unique

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**competitive  
advantages and to  
use the power of  
competitive  
strategies to  
build their organ-  
ization's  
capacity for  
advancing its  
mission. This  
book offers a  
clear  
description of  
competition and**

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Mergers  
discusses  
its practical,  
ethical, and  
political  
ramifications  
within  
the nonprofit  
sector. It  
demonstrates  
how, by being a  
more effective co  
mpetitor, a  
nonprofit can  
enhance its

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Guide To  
Winning  
Consider  
Negotiating And  
Executing A  
Merger

**chances for  
both programmatic  
and financial  
success. Play to  
Win is  
filled with  
practical tools  
for assessing a  
nonprofit's  
position in the  
marketplace and  
developing  
winning  
competitive**



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strategies. Read

a Charity Chanel

review:

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Partnerships for  
Health and Human  
Service

Nonprofits

A Comprehensive  
Guide to

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Enhancing Your  
Workbook Part I  
Mission Through  
Joint Ventures &  
Partnerships,  
Management  
Service  
Organizations,  
Parent  
Corporations,  
and Mergers  
Nonprofit  
Strategic  
Positioning  
The Nonprofit

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**Business Plan  
Nonprofit**

**Sustainability**

**Nonprofit**

**Mergers**

*Praise for The  
Negotiating And  
Nonprofit*

*Executing A  
Organizational*

*Culture Guide "This  
is an important book  
for consultants and  
managers who work  
with nonprofit  
organizations. The*

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The book  
Guide To  
Considering  
Negotiating And  
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***Nonprofit  
Organizational  
Culture Guide lays  
out basic theory  
about how  
nonprofits come to  
be and how they  
operate, and it  
demonstrates how  
important the  
concept of culture is  
to understanding  
this important  
sector of our***

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Guide To  
Considering  
Negotiating And  
Executing A  
Merge

**society." —Edgar H. Schein, professor of management, emeritus, MIT Sloan School of Management "This book is a must-read for nonprofit executives! The authors spell out the themes, beliefs, and assumptions that are unique to nonprofits,**

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*regardless of their  
size or mission,  
ultimately revealing  
how 'culture'  
manifests itself in  
organizations."*

*—Darryl A. Jones,  
Sr., CEO, Maryland  
Association of  
Nonprofit  
Organizations "This  
is the book that the  
nonprofit  
community has*

***needed for a long time. The authors provide a compelling assessment tool that all organizations can use. This book is essential to understanding how nonprofits work and why they do, or do not, achieve the outcomes and***



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**missions they set  
for themselves."—Flo**

**Green, vice**

**president,**

**IdeaEncore Network**

**"Anyone who works  
in a group and relies**

**on others to get**

**things done will**

**benefit from this**

**book. Readers will**

**discover how the**

**environment of an**

**organization**

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Workbook Part I  
The 100 Days  
Count To

***influences how  
decisions are made  
and, ultimately, how  
things get done."***

—***Natalie  
Abatemarco,  
director of North  
America community  
programs, Citigroup,  
Inc. "Every  
organization has  
culture, recognized  
or not. And that  
culture plays a***

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Guide To  
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***powerful role in  
shaping the way  
people act within  
that context. The  
insights,  
frameworks, and  
tools in this book  
will help people  
become more astute  
within their  
organizational  
cultures." —Brian  
Fraser, lead  
provocateur,***

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**Organization  
Jazzthink**

**Bring focus and  
direction to your  
work: Too often, if  
you ask four people  
in a nonprofit what  
their organization's  
mission is, you'll get  
four different  
answers.**

**Organizations  
without clearly  
defined and agreed-**

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***to mission and  
vision statements  
frequently find  
themselves adrift at  
sea, in real financial  
trouble, and unable  
to make an ongoing,  
positive impact on  
the community. But  
an effective mission  
and vision  
statement can help  
an organization  
unify services and***

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Guides  
*create a consistent  
approach to new  
program  
development.*

*Crafting Effective  
Mission and Vision  
Statements will help  
your organization  
develop (or revise)  
mission and vision  
statements that  
bring focus and  
direction to your  
work. With orderly,*

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***easy-to-follow steps,  
this engaging guide***

***shows you how to***

***build ownership for***

***the mission and***

***vision statements***

***among board and***

***staff, and create a***

***common***

***understanding of***

***your organization's***

***goals. This useful***

***guide also includes***

***definitions of***

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Guide To  
Considering  
Negotiating And  
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***mission and vision statements, how they're different, and how to use both for greatest benefit; a seven-step process to develop a mission statement that captures exactly what your organization does; a six-step process to create a vision statement based on***



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***stakeholders' ideas  
and the  
organization's  
history, capacity for  
growth, and  
fundraising  
potential; four  
options to develop a  
vision for the short-  
term future; and  
worksheets to guide  
you through the  
entire process. Use  
this guide to create***

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*mission and vision  
statements that help  
your organization  
stay focused and  
keep it moving  
toward a positive  
future.*

**THE FIRST  
COMPREHENSIVE  
GUIDE AND  
TOOLKIT FOR  
CREATING  
MEANINGFUL AND  
SUCCESSFUL**

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**NONPROFIT  
PARTNERSHIPS** The

*impossible becomes*

*possible when a*

*partnership is*

*formed, notably in*

*the changing*

*landscape of today's*

*nonprofit*

*environment. With*

*contributions from*

*expert practitioners*

*in the nonprofit*

*arena, this is the*

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Guide To  
Considering  
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Executing A  
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***first comprehensive  
guide and toolkit for  
creating meaningful,  
long-term, and  
successful nonprofit  
partnerships.  
National nonprofit  
leaders disseminate  
their expertise  
regarding the  
creation of  
noteworthy  
nonprofit  
partnerships,***

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Considering  
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Executing A  
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**mergers, and  
alliances. They  
describe challenges  
overcome and  
lessons learned.  
Detailed case  
studies address  
strategic  
partnerships at all  
levels, from  
successful  
community  
grassroots  
collaborations to full-**

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***blown mergers. The tools and methods described in the book will help readers to think strategically about consolidations and partnerships, to recognize challenges and opportunities inherent in different types of partnerships, and to***

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**successfully  
implement them.**

**The book guides  
nonprofit leaders in  
the creation of such  
primary partnership  
models as  
collaboration,  
administrative  
consolidation, joint  
programming, and  
corporate  
merger/acquisition,  
and how to select**

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Workbook Part I  
The Authors

***the model best suited to their organization.***

***Authors describe how nonprofits can adapt to change more easily, use concrete data in decision making, best position themselves for partnership, and innovate in ways that have***



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meaningful impact  
on reducing poverty.  
The book also  
discusses how to  
mitigate risk and  
debunks merger and  
partnership myths.  
Case studies  
illustrate a step-by-  
step approach to  
creating  
partnerships with a  
focus on best  
practices. A

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Considering  
Complicated  
Negotiating And  
Executing A  
Merger

***particularly welcome  
feature is the  
clarification of  
complicated legal  
documents, as well  
as a partnership  
checklist, sample  
due diligence  
information, and  
sample legal  
documents. This  
book is a valuable  
resource for current  
and future leaders in***

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**social service  
administration, the  
human services,  
public and  
community health,  
public  
administration,  
organization  
management, and  
health care  
administration and  
management. KEY  
FEATURES:**

**Introduces the first**

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comprehensive  
Workbook Part I  
guide and toolkit for  
The Leaders  
creating successful  
partnerships  
partnerships  
Written  
by respected  
national nonprofit  
leaders  
Includes  
proven tools and  
best practices for  
creating different  
types of nonprofit  
partnerships,  
mergers, and

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**Guide To**  
**Considering**  
**Negotiating And**  
**Executing A**  
**Merger**  
**alliances and**  
**choosing the best fit**  
**Presents detailed**  
**case studies**  
**illustrating**  
**challenges**  
**overcome and**  
**lessons learned**  
**Breaks down legal**  
**documents so they**  
**are easily**  
**understandable and**  
**includes a toolkit of**  
**key partnership**

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**agreements and  
documents**

**After more than a  
century of  
proliferation and  
growth, the  
nonprofit sector has  
reached a  
crossroads. The  
continued success  
of an organization's  
mission no longer  
depends on fresh,  
new programs and**

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***the extension of services, but on innovative management and revitalized organizational structure. The time has come for all nonprofits to consider mergers and alliances in their strategic plans. For many, this may seem a distasteful***

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***alternative after  
decades of Wall  
Street mergers  
made at the expense  
of workers,  
communities, and  
consumers-- but it  
doesn't have to be  
that way. In  
Nonprofit Mergers  
and Alliances,  
Thomas McLaughlin  
describes a context  
for nonprofit***



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***mergers and  
discusses the forces  
that shape their use.  
He demonstrates  
that nonprofit  
mergers are  
fundamentally  
different from  
corporate mergers,  
that they can be of  
immense benefit to  
the community as  
well as the merging  
organizations, and***

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that failure to merge  
can be disastrous  
for everyone.

McLaughlin focuses  
on the concerns of  
the nonprofit sector:  
achieving the  
mission, retaining  
tax-exempt status,  
behaving  
responsibly in the  
community. He  
shows nonprofit  
managers and board

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Guide To  
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***members how to  
make their way  
through the merger  
process without  
repeating Wall  
Street misbehavior.  
Using real-world  
examples and case  
studies, Nonprofit  
Mergers and  
Alliances offers  
clear, practical, step-  
by-step guidance  
through the merger***

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Considering  
Negotiating And  
Executing A  
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***process from  
preliminary  
considerations to  
actual  
implementation--  
pointing out pitfalls  
and offering  
insightful  
commentary along  
the way. This  
immensely helpful  
volume provides: \****  
***A penetrating  
discussion of the***

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**reasons to  
collaborate \* The  
C.O.R.E.(TM) model,  
a merger/alliance  
analysis framework  
\* Advice on partner  
selection \* Structure  
choice analyses \*  
Step-by-step  
guidance through  
merger and alliance  
processes \* A disk  
with forms and  
worksheets that any**

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***nonprofit can  
customize for its  
own needs.***

***Supplemented with  
easy-to-use  
checklists and  
analytical tables,  
Nonprofit Mergers  
and Alliances helps  
nonprofit board  
members and  
managers make the  
right decisions,  
monitor the entire***

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*process, anticipate problems, and find solutions quickly.*

*The information contained in this book will help any nonprofit organization ensure the successful continuation of its mission in the immediate future as well as for years to come. "We have two*

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**goals for this book.  
The first is to  
describe a context  
for nonprofit  
mergers, including a  
discussion of the  
forces helping to  
shape nonprofits'  
use of mergers and  
alliances. It is  
important that  
nonprofit managers  
and board leaders  
be aware of both the**



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The Leaberg  
Guide To  
Considering  
Negotiating And  
Executing A  
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***similarities and the differences in their sector's merger patterns and techniques.***

***Ultimately, a nonprofit sector that knows well how to collaborate will be far more effective in the pursuit of its public-spirited mission . . . . The second goal is to***

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provide concrete  
guidance based on  
actual nonprofit  
mergers." --From the  
author's Preface.

"Tom McLaughlin  
thoroughly  
addresses the  
subject in his timely  
and excellent new  
book *Nonprofit  
Mergers and  
Alliances*. It is a  
must for every

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*nonprofit  
professional and  
board member."*

*--Jere B. Ratcliffe*

*Chief Scout*

*Executive Boy*

*Scouts of America.*

*"In a time when all  
nonprofit managers  
need to re-evaluate  
how to most  
effectively leverage  
the total assets of  
their organizations*

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Guide To  
Considering  
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***in support of their  
social mission,  
McLaughlin  
provides a  
comprehensive  
framework for  
understanding how  
to evaluate one's  
own organization  
and the tools  
needed to effectively  
link with potential  
partners." --Jed  
Emerson Executive***

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**Director The  
Roberts Foundation  
"As the government  
continues to reduce  
both grants to and  
contracted services  
with nonprofits,  
some organizations  
are going to be  
forced to consider  
mergers and  
alliances. The key,  
as Tom so rightly  
points out, is to be**

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***prepared for change  
before there are no  
choices left. As***

***usual, Tom is out in  
front of yet another  
business trend in  
the nonprofit  
sector." --Paul***

***Clolery Editor in  
Chief Nonprofit  
Times.***

***Nonprofit***

***Management***

***Nonprofit Mergers***

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**and Alliances**  
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Nonprofit Managers  
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Considering  
Negotiating And  
Understanding Your  
Executing A  
Social Agency  
Merger  
A Leader's Guide to  
Creating a  
Successful  
Business Model  
The no-cost way

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to improve your  
organization on a  
daily basis Most  
nonprofits are  
already  
benchmarking  
informally. This  
unique book  
defines a formal  
way to  
benchmark.  
You'll learn how



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to prepare your  
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organization,  
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measure  
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performance, and  
Considering  
implement best  
Negotiating And  
practices as well  
Executing A  
as learning the  
Merger  
five key steps of  
benchmarking,  
the arguments  
against benchma  
rking—and why

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you should  
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disregard them,  
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how  
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differs from  
Negotiating And  
evaluation and  
Executing A  
assessment, how  
Merger  
to form a  
benchmarking  
team, how to  
create a  
“ success

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equation” that  
helps you  
measure your  
organization’s  
performance,  
how to make  
sure to measure  
what matters,  
how to choose  
your  
benchmarking  
partners—and

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what you can  
learn from the  
“wrong” partner,  
and how to  
overcome staff  
resistance to  
benchmarking.  
Practical tools

help you  
benchmark what  
matters Real-  
world examples

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action. Exercises  
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and worksheets  
Considering  
guide you  
Negotiating And  
through  
Executing A  
processes such  
Merger  
as drafting a  
benchmarking  
plan; identifying  
and analyzing the  
things in your

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organization that  
need  
improvement;  
prioritizing which  
processes to  
focus on;  
identifying your  
CTQ (critical to  
quality)  
outcomes; and  
more. The way  
to survive as a

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is to thrive. With  
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dollars, only the  
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best will endure.  
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ensures that  
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is always

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performance.

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It ' s something  
you can ' t afford  
Considering  
not to

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do—especially  
since you can do  
it for free!

Nonprofits often  
use the terms  
"strategic  
planning" and



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"business  
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planning"  
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interchangeably,  
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but a good  
Considering  
business plan  
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goes beyond the  
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traditional  
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strategic plan  
with its focus on  
mission and  
vision, goals and  
objectives. The

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created by the  
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strategy experts  
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at La Piana  
Negotiating And  
Consulting, helps  
Executing A  
you understand  
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what a business  
plan is and why  
you need one,  
then provides a  
practical, proven

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process for  
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creating a  
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successful,  
Guide To  
sustainable  
Considering  
business model.  
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This insightful  
Executing A  
resource further  
Merger  
explains how  
your nonprofit  
can determine  
whether a  
potential

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undertaking is economically and operationally viable - a vital tool in today's economic climate - and how to understand and solve challenges as they arise. With detailed instructions,

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an integrated  
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rigorous financial  
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analysis  
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presented  
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clearly and  
accessibly for  
those who work  
in or are  
connected to the

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decisions so that  
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you can achieve  
maximum results  
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updated resource  
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that answers the  
Considering  
most-commonly  
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asked question  
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governance. The  
book covers  
such topics as  
board structure  
and process,



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This new edition  
includes updated  
information on  
topics that have  
recently

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management, and  
mergers. Shows  
executives and  
board members  
how to be more

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effective, meet  
difficult  
situations head-  
on, and deal with  
commonplace  
challenges with  
confidence

Topics include  
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the viability of  
for-profit  
ventures, board

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assessments,  
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and questions  
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and challenges  
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book, strategy  
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expert David La  
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Piana introduces  
Executing A  
"Real-Time  
Merger  
Strategic  
Planning," a fluid,  
organic process  
that engages  
staff and board

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in a program of  
systematic  
readiness and  
continuous  
responsiveness.  
You'll find tools  
for clarifying  
your competitive  
advantage;  
generating a  
strategy  
screen--criteria



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for evaluating  
strategies to be  
able to respond  
quickly; handling  
big questions;  
developing and  
testing  
strategies; and  
implementing  
and adapting  
strategies.

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Effective Mission  
and Vision  
Statements  
Unifying the

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essential guide to  
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intensely practical,  
comprehensive  
guidebook is for both  
leaders new to the

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well as established  
Negotiating And  
veterans looking to  
Executing A  
understand how all  
Merger  
the pieces fit together.  
Showcasing practical  
tips and takeaways,  
this how-to manual  
and resource guide  
provides easy to  
implement solutions

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for organizations seeking to expand impact and meet mission. Seasoned veterans including Van Jones, Fair Trade founder Paul Rice, Lynne Twist, Kay Sprinkel Grace, Joan Garry, and more share knowledge and useful insights on all aspects of nonprofit management,

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companies, and  
foundations Online  
fundraising, social  
networking, and  
effective use of  
technology Marketing,  
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events Board and  
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the nonprofit sector  
looking for the latest  
information in the  
field.

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engaging stories of  
individual leaders of



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organizations who let  
go of their power and  
position in order to  
further their  
organization's mission  
through a merger,  
Jean Butzen provides  
an innovative,  
practical roadmap for  
executive directors,  
CEOs, and board  
member considering  
this strategy. Why

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were these leaders willing to risk their personal status and jobs? How did they handle the stress and uncertainty of seeing their organization absorbed into a larger one? Each story contains the history of the leader and why they decided to seek a merger. Then the chapter walks through

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the process for completing the merger and, crucially, the steps each leader took to let go of their nonprofit and their position. The final chapters go into more detail about the steps, and summarize the advice from the leaders. Butzen finds that all the leaders went through a similar

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six-step process. The result was always that the merger produced a stronger organization that better fulfilled its mission. And what happened to the individual leaders who merged themselves out of their position? They all prospered as well. Their stories provide both

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inspiration and practical advice on how to make a merger successful. But it all starts with the courage to let go. This book covers the formation, tax, governance, and documentation issues [of nonprofit organizations] ... and addresses some other areas, including

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mergers and sale of  
assets of nonprofits  
as well as dissolution  
of nonprofits. -- From  
the author's preface.

"This substantially  
enlarged and  
expanded second  
edition provides  
advice for historic site  
stewards with  
concerns about the  
financial sustainability  
of their historic house

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museum and its  
relevance to its  
audience. Harris adds  
seven new case  
studies and updates  
ten others to  
showcase a range of  
alternative uses to  
safeguard these  
landmark buildings"--

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Praise for  
NONPROFIT  
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"This is much more than a financial how-to book. It's a nonprofit's guide to negotiating and empowering. It demystifies mission impact and financial viability using The Matrix Map to provide

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options for any  
organization. A  
must-read for  
every nonprofit  
CEO, CFO, and  
board member."

—Julia A.  
McClendon,  
chief executive  
officer, YWCA  
Elgin, Illinois

"This book

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should stay  
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reaching  
Guide To  
distance and  
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end up  
completely dog-  
eared because  
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it walks the  
Merger  
reader through  
a practical but  
sometimes  
revelatory  
process of

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choosing the  
right mix of  
programs for  
mission impact  
and financial  
sustainability.

Its use is a  
practice in  
which every  
nonprofit  
should engage  
its board once  
a year." —Ruth

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McCambridge,  
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editor in  
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chief, The  
Guide To  
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Considering "Up  
until a few  
Negotiating And  
years ago,  
Executing A  
funding and  
Merger  
managing a  
nonprofit was a  
bit like  
undertaking an  
ocean voyage.

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Now, it's akin to windsurfing—you must be nimble, prepared to maximize even the slightest breeze, and open to modifying your course at a moment's notice.

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want their  
organizing A  
organization to  
Merge  
be able to ride  
the big waves  
of the new  
American  
economy must  
read this

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book." —Robert  
L. E. Egger,  
president, DC  
Central

Kitchen/Campus  
Kitchens And  
Project/V3

Campaign "Most  
nonprofits  
struggle to  
find a long-  
term

sustainable



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business model  
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Mission. Thanks  
to Jeanne Bell,  
Jan Masaoka,  
and Steve  
Zimmerman help  
is now in  
sight. This  
book offers

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practical,  
concrete steps  
you can take to  
develop your  
own unique path  
to negotiating and  
sustainability  
without

compromising  
your mission."  
—Heather McLeod  
Grant,

consultant,

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The Leaders  
author, Forces

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Nonprofits "At

last! An

urgently needed

framework to

prepare leaders

to meet head-on

the persistent

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twin challenges  
of impact and  
sustainability.

This is a  
practical tool  
based on good  
business A  
principles that  
can bring  
boards and  
staff members  
together to  
lead their

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organizations  
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to sustainable  
futures." —Nora

Guide To  
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Silver, adjunct  
professor and  
director, And

Center for  
Executing A  
Nonprofit and  
Public

Leadership,  
Haas School of  
Business,

University of

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California,  
Berkeley

"Together,  
Jeanne Bell,  
Jan Masaoka,  
and Steve And  
Zimmerman equal  
wisdom,

experience, and  
know-how on  
sustainability  
and lots of  
other things.

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—Clara Miller,  
president and  
CEO, Nonprofit  
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president and  
CEO, Nonprofit  
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Understanding  
Your Nonprofit  
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by  
internationally  
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scholar Armand  
Lauffer, will  
fill the



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nonprofit  
operations. The  
book will focus  
on how  
nonprofit  
agencies

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operate and not  
how they are  
managed. It has  
been assumed  
that both  
entities  
function  
similarly.

Currently, this  
assumption is  
increasingly  
seen as  
groundless:

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nonprofit and  
profit-driven  
organizations  
have different  
goals and  
functioning And  
differently  
from each  
other. This  
text addresses  
the current  
trend to  
differentiate

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how nonprofits  
are distinct.

As the position  
of nonprofit ED  
becomes more

demanding, And

there is a need  
for an up-to-  
date resource.

This revised  
edition of the  
best-selling  
book is filled

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succeeding as  
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new edition  
includes A  
thoroughly  
updated  
information and  
new content. It  
covers topics  
on timely

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issues and  
practical  
strategies  
including:  
Avoiding  
Burnout,  
Accountability,  
Professional  
Networking,  
Financial  
Literacy,  
Measuring  
Effectiveness,

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and much more.  
Ideal for ED's  
and board  
members, the  
book also  
includes new  
cases and  
stories from  
the field and  
"practical  
tips" sidebars.  
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contains:

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human resource  
audit and  
sample

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World  
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The

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Workbook Part I  
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mergers mean  
more than  
leveraging  
resources and  
meeting legal  
requirements. In  
this book the  
author guides  
you through a  
well executed  
merger and the**

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emerging views  
brought up in  
this e-book are:  
The paradox and  
the necessity of  
pursuing  
sustaining and  
disruptive  
innovation  
simultaneously  
require a new  
kind of talent  
called integral**

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**leadership, the  
usual tools of  
persuasion--  
reason,  
statistics, and  
bullet-points of  
logic -- fail to  
cause the  
necessary  
changes in  
management  
culture to allow  
disruptive  
innovation to**

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Workbook Part I  
The Business  
Guide To  
Considering  
Negotiating And  
Executing A  
Merger

**thrive. Leaders  
must guide  
companies  
through an  
emotional leap to  
embrace a future  
based upon  
disruptive  
innovation in  
technology and  
work practices  
and the search  
for viable  
disruptive**

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Negotiating And  
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**innovationnew  
customer values,  
new markets,  
new business  
modelsstarts by  
systematically  
exploring a  
company's  
strategic  
frontier.**

**An upbeat, step-  
by-step guide to  
nonprofit  
alliances that**

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**tackles the  
toughest issue in  
the process: how  
to use**

**consolidation to  
enhance rather  
than undermine  
mission. An**

**important book  
for any nonprofit  
considering  
consolidation.**

**Play to Win  
A Complete and**



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Negotiating And  
Executing A  
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Performance  
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Organizational  
Culture Guide  
Forging  
Nonprofit

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## **Alliances**

The highly  
acclaimed  
Financial and  
Strategic  
Management for  
Nonprofit  
Organizations  
provides an  
encyclopedic  
account of all  
the key

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financial,  
Workbook Part I  
legal, and  
The Leaders  
managerial  
Guide To  
issues facing  
Considering  
nonprofit  
Negotiating And  
executives.

Executing A  
This is  
Merger  
today's  
definitive  
single-source  
text and  
reference for

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Executing A  
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managing any  
nonprofit  
organization.  
Designed for  
both  
professional  
and graduate  
student

readers, this  
work

thoroughly  
addresses all

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Guide To  
Considering  
Negotiating And  
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**key aspects of  
building  
managerial  
skill and  
promoting  
imagination  
and innovation  
in**

**organizations  
across the  
nonprofit  
spectrum.**

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Herrington J.  
Workbook Part I  
Bryce presents  
The Leaders  
every  
Guide To  
technique and  
Considering  
concept in the  
Negotiating And  
context of  
Executing A  
today's public  
Merger  
policies,  
leading  
practices,  
laws, norms,  
and

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expectations.

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Bryce was a

senior

economist at

the Urban

Institute, a

Brookings

Economic

Policy Fellow,

a Fellow at

the Institute

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of Politics at  
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Considering  
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planning at  
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Massachusetts  
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theory and  
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public finance  
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Worcester,  
Executing A  
Massachusetts,  
Merger  
and was  
director of  
the program in  
legal and  
budget studies

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at the  
University  
College at the  
University of  
Maryland. He  
currently  
teaches  
courses at the  
College of  
William & Mary  
in nonprofits  
but mostly in

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corporate  
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financial  
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strategy and  
Guide To  
cost managemen  
Considering  
t-heavily  
Negotiating And  
reflected in  
Executing A  
this text. He  
Merger  
has published  
extensively  
and has served  
on many state,  
local and

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**federal  
government  
advisory  
committees. He  
has a PhD in  
economics from  
the Maxwell  
School at  
Syracuse  
University,  
and a CLU and  
ChFC from the**

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practical,  
Considering  
step-by-step  
Negotiating And  
guidance  
Executing A  
through the  
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nonprofit  
merger process  
Using real-  
world  
examples, case

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studies, and  
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frameworks,  
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Nonprofit  
Considering  
Mergers and  
Negotiating And  
Alliances,  
Executing A  
Second Edition  
Merger  
offers clear,  
practical,  
step-by-step  
guidance  
through the

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alliance  
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development  
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assessing  
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feasibility  
Executing A  
and planning  
Merger  
for  
implementation  
to post-merger  
integration,  
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breaking work  
points out  
pitfalls and  
offers  
insightful  
commentary in  
every chapter.  
Provides a  
comprehensive  
framework for  
designing and  
implementing



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effective  
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collaborations  
The Leaders  
of all kinds  
Guide To  
Offers the  
Considering  
tools needed  
Negotiating And  
to effectively  
Executing A  
collaborate  
Merger  
with potential  
partners Shows  
how nonprofit  
mergers are  
fundamentally

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different from  
for-profit  
mergers-and  
why board  
members need  
to know this  
Focuses on the  
needs of the  
nonprofit  
sector,  
including  
cultural

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compatibility  
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compassionate  
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management  
Considering  
practices  
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Shows  
Executing A  
nonprofit  
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managers and  
board members  
how to make  
their way  
through the

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mistakes  
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Insightful and  
Executing A  
realistic,  
Merger  
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Mergers and  
Alliances,  
Second Edition  
equips you

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with the tools  
and knowledge  
you need to  
create  
effective coll  
aborations.

Michael J.

Worth's studen  
t-friendly  
best-seller,  
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Management :

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provides a  
Considering  
broad,  
Negotiating And  
insightful  
Executing A  
overview of  
Merger  
key topics  
affecting  
governance and  
management of  
nonprofit

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organizations.

Worth covers

the scope and

structure of

the nonprofit

sector,

leadership of

nonprofits,

managing the

nonprofit

organization,

fundraising,

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nonprofit  
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lobbying and  
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advocacy,  
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managing  
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and global  
organizations,  
and social ent



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preneurship.  
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Written  
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practitioner  
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accountability  
and governance  
highlight new  
approaches to

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controversies  
and risks to  
nonprofits.  
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Warriors  
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Briar College,  
4-H, Housing  
First, the Cha  
n-Zuckerberg

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governance  
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issues at the  
Hershey Trust.  
Expanded  
discussions of  
risk

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offer new  
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insights on  
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developing  
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strategy,  
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building  
Executing A  
capacity, and  
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managing risk.

New social  
networks and  
social media  
content

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provides  
students with  
practical  
strategies for  
using social  
media when  
fundraising  
and marketing.

A new  
comprehensive  
case on the  
Girl Scouts of

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the USA  
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recounts  
The Leaders  
reforms  
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undertaken by  
Considering  
this iconic  
Negotiating And  
organization  
Executing A  
and current  
Merger  
challenges it  
faces. The  
chapter on  
financial  
management has

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**been**

**substantially**

**revised to**

**reflect new**

**requirements**

**for nonprofit**

**financial**

**statements**

**issued by the**

**Financial**

**Accounting**

**Standards**



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Board in 2016,

as well as an  
expanded

discussion of

audits. An

updated

chapter on

fundraising

includes

information on

the Tax Cuts

and Jobs Act

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passed in  
Workbook Part I  
December 2017,  
The Leaders  
which has  
Guide To  
implications  
Considering  
for charitable  
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giving. New  
Executing A  
references at  
Merger  
the end of  
every chapter  
guide readers  
to relevant  
cases in the

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Appendix,  
Workbook Part I  
making it easy  
The Leaders  
for  
Guide To  
instructors to  
Considering  
incorporate  
Negotiating And  
the cases into  
Executing A  
classroom  
Merger  
discussions.

Conveys the  
breadth and  
depth of the  
social work

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profession's  
Workbook Part I  
collective  
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expertise,  
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formulated and  
Considering  
written by  
Negotiating And  
social workers  
Executing A  
from many  
Merger  
backgrounds  
and  
competencies.  
A Practical  
Guide to Legal

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Leadership  
During a  
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Management 101  
The Leaders  
From**

**Collaborations  
Considering  
to Mergers**

***The Model Rules of  
Professional***

***Conduct provides  
an up-to-date  
resource for  
information on  
legal ethics.***

***Federal, state and***

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Guide To  
Considering  
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Executing A  
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***local courts in all jurisdictions look to the Rules for guidance in solving lawyer malpractice cases, disciplinary actions, disqualification issues, sanctions questions and much more. In this volume, black-letter Rules of Professional***

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Cards To  
Considering  
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**Conduct are followed by numbered Comments that explain each Rule's purpose and provide suggestions for its practical application. The Rules will help you identify proper conduct in a variety of given**



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Guide To  
Considering  
Negotiating And  
Executing A  
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***situations, review  
those instances  
where  
discretionary  
action is possible,  
and define the  
nature of the  
relationship  
between you and  
your clients,  
colleagues and the  
courts.***

***Nonprofit Strategic  
Positioning: Decide***

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***Where to Be, Plan  
What to Do is the  
first nonprofit-  
oriented book to  
describe strategic  
positioning as an  
alternative to  
traditional  
strategic planning.  
Even in the  
nonprofit sector,  
strategic planning  
is becoming  
discredited as a***

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**formulaic, go-  
nowhere exercise.  
This book will take  
the reader on a  
stimulating  
journey through  
nonprofit strategy  
development and  
implementation.  
The book is timely  
because the  
nonprofit sector  
has reached a  
turning point**

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**where the need to  
be more business-  
like is undeniable,  
and the continuing  
retreat of the  
public sector has  
left even wider  
gaps in services  
that nonprofits will  
be asked to fill.**

**Nonprofit Strategic  
Positioning: Decide  
Where to Be, Plan  
What to Do offers**

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Guide To  
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***a fresh new way  
for nonprofits to  
meet the  
challenges of the  
21st century.  
Nonprofit mergers  
are on the rise.  
Executive directors  
and board  
members are  
discovering the  
advantages:  
comprehensive  
service delivery,***

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Mergers  
***better finances,  
more powerful  
fundraising,  
increased market  
share. Bottom line,  
mergers make  
more mission  
possible. From  
assessing reasons  
and readiness, to  
finding a partner,  
to negotiating the  
best path, to  
budgeting and***

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Workbook Part I  
Piana guides you  
through the maze  
of options with a  
steady hand.  
Based on  
experience with  
more than sixty  
mergers, this  
handbook is the  
perfect starting  
point for any  
nonprofit exploring

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The Leaders  
Come To  
Considering  
Negotiating And  
Executing A  
Merger

***a possible merger  
and a basic  
resource for all  
nonprofit  
managers. You'll  
find: how to decide  
what kind of  
structure from  
collaboration to  
merger meets your  
goals; how to know  
your own  
motivation and  
keep your mission***



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Negotiating And  
Executing A  
Merger

***forefront; what  
kind of merger  
best fits your  
goals, structure,  
and financial  
situation; how to  
seek merger  
partners and  
objectively assess  
the pros and cons  
of each; how to  
manage the boards  
essential role in  
merger***

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**considerations;  
how to exercise  
due diligence and  
write the merger  
agreement; how to  
deal with the  
rumor mill; what  
you can do  
yourself, when to  
call in attorneys  
and consultants,  
and how to select  
them; typical  
roadblocks and**

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***how to beat them;  
how to move past  
old history and  
build new  
traditions as you  
integrate staff,  
management,  
boards, systems,  
and corporate  
cultures; how to  
budget for and  
raise funds to  
implement the  
merger; and much***

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more! Full merger  
Workbook Part I  
case studies,  
decision trees,  
twenty-two  
worksheets,  
checklists, tips,  
milestones, an  
extensive resource  
section and many  
samples including  
the minutes of a  
completed merger  
negotiation give  
you concrete

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Timeline  
Guide To  
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***assistance with  
your own merger  
plans and  
implementation. A  
special chapter  
written for  
nonprofit  
organizational  
consultants  
explains their roles  
and  
responsibilities in  
assisting clients  
interested in***

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**merger.**

**A comprehensive  
handbook for  
leading a  
successful  
nonprofit This  
handbook can  
educate and  
empower a whole  
generation of  
nonprofit leaders  
and professionals  
by bringing  
together top**

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The Leaders  
Guide To  
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Executing A  
Merger

**experts in the field  
to share their  
knowledge and  
wisdom gained  
through  
experience. This  
book provides  
nonprofit  
professionals with  
the conceptual  
frameworks,  
practical  
knowledge, and  
concise guidance**

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The Handbook  
Guide To  
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Executing A  
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***needed to succeed  
in the social  
sector. Designed  
as a handbook, the  
book is filled with  
sage advice and  
insights from a  
variety of trusted  
experts that can  
help nonprofit  
professionals  
prepare to achieve  
their  
organizational and***



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**personal goals,  
develop a better  
understanding of  
what they need to  
do to lead,  
support, and grow  
an effective  
organization.**

**Addresses a wealth  
of topics including  
fundraising,  
Managing  
Technology,  
Marketing,**

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Mergers,  
**Finances,  
Workshop Part I  
Advocacy, Working  
with Boards  
Contributors are  
noted nonprofit  
experts who define  
the core  
capabilities needed  
to manage a  
successful  
nonprofit Author is  
the former  
Executive Director  
of Craigslist**

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**Foundation This  
Workbook Part I  
offers leaders  
professionals key  
insights that will  
have a direct  
impact on  
improving their  
daily work.  
Supporting,  
Managing, and  
Maximizing Your  
Nonprofit's  
Technology**

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Ensuring the Long-  
Term Preservation  
of America's  
Historic Houses

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*In this new edition of his popular textbook, Nonprofit Organizations: Theory, Management, Policy, Helmut K. Anheier has fully updated, revised and expanded his comprehensive introduction to this field. The text takes on an international and*

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*comparative dimensions  
perspective, detailing  
the background and  
concepts behind these  
organizations and  
examining relevant  
theories and central  
issues. Anheier covers  
the full range of  
nonprofit organizations  
– service providers,  
membership  
organizations,  
foundations, community*

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*groups – in different fields, such as arts and culture, social services and education. He introduces central terms such as philanthropy, charity, community, social entrepreneurship, social investment, public good and civil society, whilst explaining how the field spills over from public management, through nonprofit*

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management and public  
administration. The  
previous edition won the  
Best Book Award at the  
American Academy of  
Management in 2006.  
Nonprofit  
Organizations: Theory,  
Management, Policy is  
an ideal resource for  
students on  
undergraduate and  
postgraduate courses in  
both Europe and North



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*The Clock Is Ticking . . .*

*Is Your Nonprofit*

*Ready? Boomers are*

*leaving the*

*workforce--soon. Do*

*you have a plan to*

*replace them? How do*

*you relate to GenX and*

*Gen@ employees,*

*volunteers, and donors?*

*What are you*

*doing--today--to adjust*

*your services, your*

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*outreach, your mission?*

*Workbook Part I*  
*Generational change*  
*presents as many*  
*opportunities for*  
*nonprofits as*  
*challenges. In*  
*Generations: The*  
*Challenge of a Lifetime*  
*for Your Nonprofit,*  
*nonprofit mission expert*  
*Peter Brinckerhoff tells*  
*you what to expect and*  
*how to plan for it. From*  
*iPod policies to*

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recruiting younger  
Workbook Part I  
board members,  
The Leaders  
Brinckerhoff shows how  
Guide To  
you can address  
generational trends,  
Considering  
today, to keep your  
Negotiating And  
nonprofit organization  
Executing A  
relevant and able to  
Merger  
meet the changing needs  
of your staff, volunteers,  
donors, and the  
community you serve.  
Six trends, and what to  
do about them

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*Generations examines six generational trends that will affect everything you do: 1) financial stress, 2) technological acceleration, 3) diversity of population, 4) redefining the family, 5) MeBranding, and 6) work-life balance. You'll come away with an understanding of these trends and how they will*

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*impact your nonprofit.  
Individual chapters  
provide in-depth  
information on how to  
deal with generation  
issues in each area of  
your organization--staff,  
board, volunteers,  
clients, marketing,  
technology, and  
finances. Practical tools  
help you take action  
This hands-on guide  
includes the*

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*Generational Self-Assessment Tool. This tool gives you a baseline to measure your success as you bring generations into your planning. Throughout the book, you'll find real-life examples that illustrate key points. You'll also find practical ideas that you can use immediately. Finally, the book includes keys*

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*points and discussion  
questions--because you  
need to get your staff  
and board involved in  
this discussion today.*

*The wake-up call been  
given to nonprofit  
boards and staff alike:  
now is the time to plan  
for generational change.*

*The Nonprofit Mergers  
Workbook*

*The Nonprofit Guide to  
Competitive Strategy*

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