

Creating ‘A Great Place To Be’: A Case Study of Boys and Girls Clubs of South Coast BC’s Merger

**Shawna Smith, MACD Candidate
School of Public Administration, University of Victoria
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Client: Carolyn Tuckwell, President & CEO
Boys and Girls Clubs of South Coast BC

Supervisor: Dr. Evert Lindquist
School of Public Administration, University of Victoria

Second Reader: Dr. Thea Vakil
School of Public Administration, University of Victoria

Chair: Dr. Bart Cunningham
School of Public Administration, University of Victoria

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EXECUTIVE SUMMARY

An increasing number of non-profit organizations are considering mergers as a creative response to pressing financial, service, and governance demands (La Piana Associates, 2008; McCormick, 2001; McLaughlin, 2010). On April 1, 2011 two sister organizations - Boys and Girls Club of Greater Vancouver (BGCGV) and Boys and Girls Club Community Services of Delta/Richmond (BGCCS) - legally amalgamated into Boys and Girls Clubs of South Coast BC (BGCSCBC). The purpose of this report is to document and analyze current BGCSCBC employees' merger experiences from April 1, 2011 onwards, and pose options to promote successful organizational development over the next year. As non-profit merger integration often spans three years, timing is ideal for BGCSCBC to assess merger outcomes and develop future integration plans (McLaughlin, 2010).

This report addresses two central questions:

- How did BGCSCBC employees' experience the merger process from April 1, 2011 onwards?
- How can BGCSCBC's leadership team promote successful organizational development over the next year?

Literature addressing organizational change, non-profit mergers, and for-profit mergers endorses merger process models (Benton & Austin, 2010; Bridges, 2009; La Piana Associates, 2004; Lewin, 1947; Marks & Mirvis, 2000). While recognizing the iterative nature of change, process models typically involve three or more stages which compartmentalize aspects of merger development (Pietroburgo & Wernet, 2008). As BGCSCBC employed La Piana's model (2004), this report references merger stages of negotiation, implementation, and integration. Merger stages inform the analytic framework, survey questions, analysis of findings, and options for consideration.

This report utilises an analytic framework which builds upon Benton and Austin's conceptual map of merger dynamics that suggests each stage of the merger process influences future stages and overall merger outcomes (2010). The revised framework integrates stage-specific merger success factors that reflect themes identified via a review of non-profit, for-profit, and public sector merger research from the US, UK, Canada, and Australia. Success factors include: merger drivers, initial merger communication, compatibility, organizational resources, and leadership during negotiations; leadership, communication, staff involvement and morale, and organizational culture during implementation; and leadership, communication, staff satisfaction, organizational identity, and culture during integration.

To uncover pre-merger organizational dynamics, merger goals, negotiations, and implementation plans, all organizational documents developed by BGCSCBC's Joint Merger Committee during 2009 and 2010 were reviewed. Post-merger documents were also reviewed to assess merger outcomes. Staff members' merger experiences were obtained via a twenty question online survey addressing stage-specific merger success factors. Surveys were

circulated to all current BGCSCBC staff (excluding seasonal staff) of various hire organizations, positions, and tenures.

Merger documents revealed:

- Proactive, internal merger motivations to enhance programs and services
- Significant BGCGV-BGCCS compatibility
- An organized and strategic Joint Merger Committee
- A plan to uphold ethical, transparent human resources practices throughout the merger
- Over \$1 million in merger-related costs
- Significant post-merger growth and capacity development
- A detailed 2013-2018 Strategic Plan focused on cultivating employees as 'Champions of Kids'

The vast majority of respondents from all organizational levels and affiliations expressed significant satisfaction with both the merger process and outcomes to date including their level of merger involvement, leadership support, cultural integration, post-merger opportunities and BGCSCBC's organizational identity. Key staff recommendations for organizational development included: integrating cultures and building teams; enhancing human resource systems; integrating administrative systems, policies, and procedures; and increasing program awareness.

Three packages of options were presented for BGCSCBC to address lingering staff-identified challenges, and realize the human resource objectives of the 2013-2018 Strategic Plan. Each included strategies to address BGCSCBC's primary post-merger challenge: to cultivate employees as 'Champions of Kids.'

Options included:

1. **Creating a good place to be:** A limited approach for BGCSCBC to address lingering staff challenges over the short term
2. **Creating a great place to be:** A moderate approach for BGCSCB to address staff challenges and cultivate employees over the next year
3. **Creating the place to be:** A comprehensive package facilitating high staff engagement and reach over the long-term

Options required varying levels of commitment, and were assessed based on required costs and leadership support, potential staff engagement, time, and reach. Option 2 was recommended as it requires moderate funds and leadership support, yet facilitates moderate-high staff engagement and reach over the next year. Specific Option 2 strategies include:

- Monthly office hours with the CEO to personalize staff-leadership communication
- A merger celebration event to recognize staff efforts
- A Culture Club with increased capacity and resources to promote ongoing team building and cultural integration
- Program awareness videos to showcase BGCSCBC's services to stakeholders

By pursuing Option 2, BGCSCBC can move from a good to *great* place to be.

TABLE OF CONTENTS

EXECUTIVE SUMMARY	3
1. INTRODUCTION	7
2. BACKGROUND	8
Canada’s Non-profit Sector: A Viable Merger Environment	8
Client Background.....	9
Revisiting the Problem.....	11
3. METHODOLOGY	13
Secondary Data Collection.....	13
Primary Data Collection	14
Sample	14
Strengths, Limitations, and Risks	15
4. FINDINGS: LITERATURE REVIEW AND ANALYTIC FRAMEWORK	16
What is a Merger?	16
Merger Drivers.....	17
Differentiating Public, Private, and Non-profit Sector Mergers	18
Merger Stages: Negotiation, Implementation, Integration.....	18
Barriers and Enablers to Successful Mergers	19
Non-profit Merger Theory & Analytic Framework	21
5. FINDINGS: REVIEW OF ORGANIZATIONAL DOCUMENTS.....	23
Stage 1: Merger Negotiations.....	23
Stage 2: Merger Implementation	24
Stage 3: Merger Integration	26
Conclusion: Perspectives from Documents	29
6. SURVEY FINDINGS	30
Stage 1: Merger Negotiations.....	30
Stage 2: Merger Implementation	31
Stage 3: Merger Integration	33
Future Integration Planning.....	35
Conclusion: The Merger Process in Perspective.....	36
7. DISCUSSION.....	37
Merger Negotiations: An Excellent Start	37
Merger Implementation: A Successful Stage with Minor Hiccups	38
Merger Integration: A Strong Finish with Lingering Challenges	39
Merger Outcomes: A Successful Process Yields Promising Results.....	40
Post-Merger Organizational Development: BGCSCBC’s 2013-2018 Strategic Plan.....	41
Conclusion: Looking Beyond a Successful Merger.....	42
8. OPTIONS.....	43
Option 1: Creating ‘a good place to be’ – addressing lingering staff concerns in the short term.....	44
Option 2: Creating ‘a great place to be’ – cultivating employees over the next year	45
Option 3: Creating ‘the place to be’ – investing in a long-term human resource strategy	46
Comparing the Options.....	48

Table 14 compares the options for consideration based on the criteria mentioned above: staff engagement, reach, leadership support, time, and costs. Appendix 12 compares individual strategies within each option and includes budgetary details.....	48
Recommended Option.....	48
9. IMPLEMENTATION PLAN.....	49
10. CONCLUSION.....	51
11. REFERENCES.....	53
12. APPENDICES.....	58
Appendix 1: Types of Mergers.....	58
Appendix 3: BGCGV Organizational Chart.....	60
Appendix 4: BGCCS Organizational Chart.....	61
Appendix 5: Survey Participant Invitation Form.....	62
Appendix 6: Survey Participant Letter of Information for Implied Consent.....	64
Appendix 7: Survey Questions.....	66
Appendix 9: SWOT Analysis.....	70
Appendix 10: BGCSCBC Organizational Chart.....	71
Appendix 11: Staff Recommendations for BGCSCBC’s Organizational Development.....	72
Appendix 12: Comparing Recommendations within Options.....	74

List of Tables and Figures

Table 1: Comparing BGCGV and BGCCS.....	10
Table 2: Survey Respondents Compared to Total BGCSCBC Staff.....	14
Table 3: Organizational Positions Based on Merger Motivations.....	17
Table 4: Stage-specific Merger Success Factors.....	21
Table 5: Key Document Findings Regarding Merger Negotiations.....	24
Table 6: Key Document Findings Regarding Merger Implementation.....	25
Table 7: Key Document Findings Regarding the Merger Integration Process.....	27
Table 8: Then and Now – Comparing BGCGV, BGCCS, and BGCSCBC.....	28
Table 9: Key Survey Findings Regarding Merger Negotiations.....	31
Table 10: Key Survey Findings Regarding Merger Implementation.....	32
Table 11: Key Survey Findings Regarding Merger Integration.....	34
Table 12: Merger Outcomes: Key Successes and Recommendations for Development.....	41
Table 13: Options for BGCSCBC to Consider.....	47
Table 14: Evaluating Options for Consideration.....	48
Table 15: Implementation Plan.....	49
Figure 1: The Strategic Alliance Continuum.....	16
Figure 2: Non-Profit Merger Process Model.....	18
Figure 3: Analytical Framework.....	21

1. INTRODUCTION

On April 1, 2011 Boys and Girls Clubs of Greater Vancouver (BGCGV) and Boys and Girls Clubs Community Services of Delta/Richmond (BGCCS) legally amalgamated into Boys and Girls Clubs of South Coast BC (BGCSCBC). BGCSCBC is among few British Columbian charities which have undertaken a merger. Nearly two years after the merger, BGCSCBC is interested in collecting and analyzing staff members' merger experiences as "relationships are fundamental in Boys and Girls Clubs work, none more important than that of employee/employer" (Joint Merger Committee, 2009a, p. 5). The process of merger integration often spans three years (McLaughlin, 2010); consequently, timing is ideal for BGCSCBC to assess merger outcomes and develop strategies to continue successful organizational development over the next year.

The purpose of this report is to document and analyze current BGCSCBC employees' merger experiences from April 1, 2011 onwards, and recommend strategies to promote successful organizational development over the next year. This report will address two central questions:

- How did BGCSCBC employees' experience the merger process from April 1, 2011 onwards?
- How can BGCSCBC's leadership team promote successful organizational development over the next year?

To address these questions, the methodology involves a review of the literature on organizational mergers, a review of BGCSCBC documents, and surveys of the perceptions of BGCSCBC staff on how well the merger was designed, introduced and implemented. Findings will inform how BGCSCBC implements the 2013-2018 Strategic Plan, and may serve as a case study for non-profit organizations considering mergers.

Section 2 provides background on Boys and Girls Clubs of Canada, Boys and Girls Clubs of Greater Vancouver, Boys and Girls Clubs Community Services of Delta/Richmond, and Boys and Girls Clubs of South Coast BC. Section 3 outlines the methodology section for this study describing how primary and secondary data were collected, and assesses the project's strengths, limitations, and risks. Section 4 outlines literature review findings and sets out the analytic framework which incorporates stage-specific merger success factors identified in the literature review. Sections 5 and 6 respectively summarize key findings from the review of merger documents and the surveys which were undertaken. These findings are discussed in Section 7 by the merger stages of negotiation, implementation, and integration. The discussion section concludes with a summary of BGCSCBC's current challenges and staff recommendations for organizational development. Section 8 outlines three options for BGCSCBC to consider in order to address staff recommendations and realize the 2013-2018 Strategic Plan. Section 9 outlines an implementation strategy for the recommended option. Section 10 reviews what this study accomplished and identifies further research that could be undertaken.

2. BACKGROUND

The purpose of this section is to provide background for the study, including an overview of the current challenges facing Canadian non-profit organizations, and information on the client organization. A brief review of recent research suggests that non-profits in Canada and abroad are encountering similar challenges. Mergers are presented as a viable option to address these challenges. This discussion leads to a summary of the client organization's merger process including profiles of Boys and Girls Clubs of Canada, both initial organizations (Boys and Girls Clubs of Greater Vancouver and Boys and Girls Clubs Community Services of Delta/Richmond) and the unified organization (Boys and Girls Clubs of South Coast BC).

Canada's Non-profit Sector: A Viable Merger Environment

According to Imagine Canada's 2013 Sector Monitor Report, non-profit organizations are experiencing record financial, performance, and governance challenges (Lasby & Barr, 2012). Among 1,909 non-profit leaders, 33% of respondents expect their financial and human resource capacity to decrease during the next year and 40% are concerned over meeting next year's expenses. These challenges are compounded by inter-sector competition and service overlaps. In British Columbia alone, nearly half of 20,000 non-profit organizations struggle to operate with budgets under \$30,000 (NSNVO, 2003 as cited in Bar et al., 2006).

An increasing number of non-profit organizations within the US, the UK and Australia are considering non-profit mergers to address fiscal concerns, build organizational capacity, and enhance social impact (Arsenault, 1998; Ferranto & Perryman, 2003; Golensky & DeRuiter, 2002; Jenkins, 2000; Singer & Yankey, 1991; Yankey et al., 2001). Although merger outcomes are case-specific, potential benefits relate to program development, expansion, and impact; enhanced visibility and reputational capital; strategic positioning; human resource recruitment and retention; and financial sustainability. Merged non-profit organizations are also more likely to report successes compared to private and public sector mergers (Charity Commission, 2003; Dewey & Kaye, 2007; Singer & Yankey, 2001).

Numerous American institutions support non-profit mergers by financing feasibility studies, consulting, and implementation (Chen & Krauskopf, 2012; La Piana, 2008; MacLaughlin, 2010). The Muttart Foundation and Vancouver Foundation have funded merger feasibility studies, yet no financing programs for Canadian non-profit mergers have emerged (Ferronato & Perryman, 2003). The incidence of Canadian non-profit mergers is also unknown, yet piecemeal studies propose approximately five percent of all registered non-profit organizations in the US and the UK merge each year (Charity Commission, 2003; Chen & Krauskopf, 2012; Cortez, Foster & Milway, 2009; Pradhan & Hindley, 2009). Imagine Canada identified a need for transformative partnerships as a key sector trend during 2010; however, low incidence rates of Canadian non-profit mergers and limited financing speaks to the area's underdevelopment. Boys and Girls Clubs of South Coast BC is among few Canadian non-profits which have undertaken a merger to address sector challenges and build organizational capacity.

Client Background

Boys and Girls Clubs of Canada (BGCC) is a renowned charity. Approximately 99 member Clubs provide programs and services that promote healthy child and youth development for over 200,000 Canadians across 650 urban, rural, and Aboriginal communities each year. As the national voice of the Boys and Girls Club movement, BGCC provides member Clubs with grants and scholarships; initiates research addressing child and youth violence, after school programs, healthy eating, and physical activity; and advocates for child and youth issues by engaging in public policy consultations with Members of Parliament (BGCC, 2013). BGCC affiliates operate independent organizations, yet uphold core BGCC values of inclusion and opportunity, respect and belonging, speaking out, collaboration, and empowerment. Prior to the merger, BGCGV and BGCCS operated distinct charitable non-profit organizations affiliated with BGCC (BGCCS, 2008). The merged organization, BGCSCBC, is a BGCC affiliate.

Since 1936, Boys and Girls Clubs of Greater Vancouver (BGCGV) provided community-based child, youth, and family programs. During 2009, BGCGV operated the following: seven Clubs with after-school, summer, and break-time programming; three substance mis-use programs for youth and families; parent support groups; a volunteer program; and a summer camp supporting approximately 6,000 youth and families each year. BGCGV served communities across Vancouver, Burnaby, North Vancouver, Langley, and Surrey. As of 2010, BGCGV employed approximately 50 permanent full-time and part-time staff in addition to 100 casual staff. BGCGV also housed BGCGV Foundation (BGCGVF) which accrued significant financial resources. During 2009, BGCGVF allocated \$1,415,000 to BGCGV's \$4,453,773 revenue stream (Joint Merger Committee, 2009a). Until March 2011, BGCGV was incorporated under the BC Societies Act, and held federal status as a Registered Charitable Organization.

Like BGCGV, Boys and Girls Clubs of Delta/Richmond (BGCCS) provided social and recreational programming via Club locations. BGCCS also operated a breadth of specialized services, including: family drop-ins, parent education workshops, and family support groups; counselling programs addressing child sexual abuse, youth justice, mental health, and diverse family and youth needs; an employment resource centre; and several youth employment training programs. By delivering a range of contracted social services, government funds comprised BGCCS's primary income stream. BGCCS' programs also upheld internationally recognized standards for quality human service programs via CARF Canada, whereas BGCGV did not have accreditation (BGCCS, 2008). By providing child, youth, and family services for over 50 years, Boys and Girls Club Community Services of Delta/Richmond (BGCCS) exhibited strong roots in North Delta, Ladner, Tsawwassen, Richmond, and Surrey.

Similar to BGCGV, BGCCS employed approximately 57 permanent full-time and part-time staff. All staff members were supported by a Human Resources Manager. Both BGCCS and BGCGV had similar hierarchical structures, with service staff reporting to Program Managers, and Managers reporting to an Executive Director (BGCCS)/Director of Operations supervised by the CEO (BGCGV) who, in turn, were accountable to a voluntary Board of Directors (see Appendices 3, 4, and 10). Unlike BGCCS, the presence of BGCGV's CEO position separated fiscal stewardship and

strategic leadership from program management functions. Table 1 summarizes key similarities and differences between BGCGV and BGCCS.

Table 1: Comparing BGCGV and BGCCS

	BGCGV	BGCCS
Values	Inclusion and opportunity, respect and belonging, empowerment, collaboration, speaking out	
Vision	To bring out the best in every child, youth, and family who needs us	Building brighter futures in partnership with our community.
Mission	To provide a safe, supportive place where children and youth can experience new opportunities, overcome barriers, build positive relationships, and develop confidence and skills for life.	Providing opportunities for individuals and communities to enhance lives through a continuum of quality programs and services.
Established	1936	1963
Staff (2011)	Approximately 50 Full-time and Part-time, and 100 Casual/Seasonal	Approximately 57 Full-time and Part-time, and 70 Casual/Seasonal
Sites and Service Areas	Eight Sites across South Vancouver, East Vancouver, North Vancouver, Burnaby, Langely, Surrey, Sunshine Coast	Eight Sites across North Delta, South Delta, Ladner, Tsawwassen, Richmond Surrey
Centralized Supports/ Infrastructure	Internal fundraising and finance expertise	IT, accreditation, and human resource expertise
Primary Funding	Charitable Giving via BGCGV Foundation	Government Contracts
Annual Expenses	\$4, 540, 387 (2009)	\$3, 690, 821 (2008)

In late spring 2009, the upcoming retirement of BGCCS' Executive Director prompted the organization to assess the viability of merging with BGCGV. The organizations had engaged in merger conversations over the past few decades, yet plans never materialized. The leadership transition inspired both Boards to commence formal merger discussions, establish a Joint Merger Committee, and develop a Business Case for Board review.

Interestingly, BGCCS (previously known as Boys' & Girls' Club of Delta) had the benefit of previous merger experience. On April 1, 2005 Boys' & Girls' Club of Delta (BGCD) merged with Delta Youth Services (DYS) after 3 years of sharing an administrative structure. BGCD provided social and recreational services to children and youth via two Clubs located in Ladner and North Delta, and DYS provided counseling, support services, and employment programs to youth, families and adults across Delta, White Rock, North Surrey, and Newton West. Eighteen BGCD staff and 150 volunteers operated with a budget of \$580,000, primarily funded by non-government sources. Although DYS received funds primarily via government contracts, it employed twice as many staff as BGCD and operated with a budget of \$1,800,000. Four administrative staff and seven program staff experienced the BGCD-DYS and BGCGV-BGCCS mergers. As survey questions did not address the previous merger, it is difficult to ascertain if

the previous merger impacted staff members' merger perceptions or experiences. This report focuses on BGCGV-BGCCS' merger process, outcomes, and future organizational planning.

During 2009, BGCCS and BGCGV completed inter-organizational assessments to review the following: mission, vision, and value congruency; assets; liabilities; and partnership history. As affiliates of Boys and Girls Clubs of Canada, BGCGV and BGCCS shared values, endorsed similar mission and vision statements, and upheld the tagline "a good place to be." Both enjoyed comparable human, financial, and reputational resources; although BGCCS was primarily funded through government contracts and BGCGV relied on charitable giving via BGCGVF (Joint Merger Committee, 2009a). Each organization operated distinct sites and provided specialized services, yet both operated similar Club programs and provided services within Surrey.

The Joint Merger Committee's strategic investigation identified significant merger benefits including but not limited to: service expansion, brand development, reduced competition, relationship building, and increased intellectual capital (Joint Merger Committee, 2009a). These benefits outweighed potential threats of reduced organizational donors, grantees, and volunteers. In June 2010, after a year of extensive merger exploration, both BGCGV and BGCCS Boards declared an intent to merge. Following significant planning, BGCGV and BGCCS legally amalgamated into BGCSCBC on April 1, 2011. BGCSCBC currently operates 19 sites with an annual budget of \$9,913,000 (BGCSCBC, 2013b).

Revisiting the Problem

Strategic non-profit mergers may enhance organizational capacity, strategy, and reputation; reduce competition; and increase efficiency, effectiveness, scope, and impact (Benton & Austin, 2010; Blumberg, 2009; Burke-Robinson, 2000; Jenkins, 2000; Vergara-Lobo, Masaoka & Smith, 2005). However, merger success requires ongoing communication, leadership, and stakeholder management (Benton & Austin, 2010; Chen & Krauskopf, 2012; Marks & Mirvis, 2000). This report presents mergers as an option for inter-organizational cooperation which may enable some non-profit organizations to better address sector challenges and meet strategic goals. Mergers are particularly relevant to highly compatible non-profit organizations with similar resource bases, collaborative leadership, and mutual motivations (Benton & Austin, 2010).

As the BGCSCBC merger arose from internal proactive motivations to reduce competition, grow, and address succession planning, it was well positioned to address integration challenges (Joint Merger Committee, 2009a). Compared to organizations that merge to absolve financial struggles or evade dissolution, BGCGV and BGCCS had sufficient time to conduct a thoughtful merger. However, as noted above and delved into more detail in Section 4 of this report, no mergers are challenge-free.

The purpose of this report is to glean the Joint Merger Committee's intentions for merger development, and staff perceptions of the merger process, in order to identify lingering merger integration challenges and pose strategic recommendations for BGCSCBC to pursue over the next year. It will do so by identifying non-profit merger success factors with a literature review,

analyzing documents on BGCSCBC's merger process, surveying BGCSCBC staff on their merger experiences, and developing options and identifying a recommended way forward to promote successful organizational development over the next year.

3. METHODOLOGY

This research project utilises several qualitative methods including a literature review, a review of documents, and a survey of staff perceptions of the merger process. Findings from these three sources inform options for BGCSCBC's organizational development over the next year. This section concludes with a review of methodological risks, strengths, and weaknesses.

Secondary Data Collection

Secondary data collection includes two reviews: a literature review, and a review of organizational documents pertinent to the BGCSCBC merger.

The literature review includes journal articles, books, and professional case studies addressing public, non-profit, and private sector organizational mergers within the US, UK, Australia, and Canada. The purpose of the literature review is twofold. First, it provides background on the scope, process, drivers, benefits, and challenges associated with non-profit merges while distinguishing non-profit mergers from alternative types of inter-organizational relationships, for-profit mergers, and public sector mergers. Second, the literature review identifies stage-specific merger success factors which inform the analytic framework and survey questions (see Figure 3 and Appendix 7).

A review of BGCSCBC's merger documents include 10 electronic files developed by the Joint Merger Committee between 2009 and 2010. Documents include:

- 2009 Business Case
- June 2009 Confidentiality Agreement
- October 2010 AGM Final Merger Agreement
- October 2009 Merger Rationale for Boards
- December 2009 Intent to Merger Letters
- January 2010 Implementation Plan
- May 2010 Proposal for Pro Bono Legal Support
- September 2010 Transitions Document
- November 2010 Transitional Strategic Plan
- 2010 Merger Resources Bibliography

Internal documents provide background information on the merger *process* including both organizations prior to the merger, merger goals, negotiations, and implementation plans. BGCSCBC's 2012-2013 Annual Report (BGCSCBC, 2013a), 2013-2014 Approved Operating Budget (BGCSCBC, 2013b), and 2013-2018 Strategic Plan (BGCSCBC, 2013c), are also reviewed to assess merger *outcomes* and organizational development plans. Findings from this review are discussed in relation to stage-specific merger success factors and compared to survey findings.

Primary Data Collection

All current BGCSCBC staff members – excluding seasonal staff – were invited to respond to an online survey via Survey Monkey between July 22 and August 9, 2013. Seasonal staff members were exempt as the majority work out of seasonal facilities (i.e. camps) which pose practical barriers to online surveying, and 92% were hired post-merger. Prior to survey completion, all potential participants received a project description, an Invitation to Participate (see Appendix 5), and a Letter of Information for Implied Consent (see Appendix 6). Two hundred and fifty-six staff received surveys, and 40 were completed.

The survey included twenty questions: four multiple choice questions assessing organizational tenure, position, and initial hire organization; and sixteen open-ended questions exploring staff members' experiences during merger implementation and integration, and their desires for future integration (see Appendix 11). To ensure confidentiality and anonymity no names or contact information were requested. Individual questions correspond with stage-specific merger success factors outlined in the analytic framework (see Figure 3 in Section 4).

Sample

The sample includes forty surveys completed by Directors/Managers (18% of sample), Coordinators (23%), Program Staff (33%), Activity Leaders (18%), and Administrators (8%). Respondents are primarily full-time (80%) and part-time employees (15%) exhibiting various levels of organizational tenure. Although two and a half percent of respondents were hired during the past year the sample is fairly evenly distributed among one to two years, three to five years, five to ten years, and over ten years of employment. The sample includes staff initially hired by BGCGV (44% of sample), BGCCS (36%), and post-merger hires (20%).

Table 2: Survey Respondents Compared to Total BGCSCBC Staff

	BGCGV	BGCCS	BGCSCBC	Total	Total Responses Collected
Full-time	24	17	21	62	31
Part-time	8	7	4	19	6
Casual	45	31	99	175	2
Seasonal	1	3	45	49	N/A
TOTAL	78	58	169	305	40

Approximately half of all current BGCSCBC full-time staff and one third of part-time staff returned surveys. Activity Leaders comprise the majority of BGCSCBC staff members, as 204 of 305 staff are seasonal, casual, part-time, or full-time Activity Leaders. Only two of 175 casual staff and seven of 204 Activity Leaders responded. The two casual staff who responded were Activity Leaders. Five of the seven Activity Leaders who responded were hired by BGCGV, and 2 did not experience the merger.

More staff may have responded if the survey had been available for a longer period of time, and if the survey was not conducted during peak summer programming. Low participation among Activity Leaders is likely due to the fact Activity Leaders work directly with children and youth during July and August, and do not typically access computers during working hours. It is difficult to ascertain whether low response rates from casual staff stem from a lack of time during working hours, apathy, that 99 of 175 did not experience the merger, or other variables.

Strengths, Limitations, and Risks

By employing mixed methods, this report gathers information on BGCSCBC's merger from multiple perspectives – staff, the Joint Merger Committee, and recent research related to non-profit mergers. To maximize response rates, and adhere to time restrictions, online surveys were selected as an appropriate primary data collection method.

The research methods major strengths include anonymity in data collection and reporting, and a broad reach. Surveys were distributed to all current BGCSCBC staff – except seasonal staff – to capture multiple organizational perspectives (depending on response rates). However, compared to interviews, surveys limit the depth of responses from staff. To maintain the research focus of uncovering staff perceptions of the merger process, members of the Joint Merger Committee and BGCSCBC Board were not invited to participate. Board opinions are reflected in the Joint Merger Committee's merger documents.

The subject of risk and potential harm to BGCSCBC research participants was thoroughly explored by BGCSCBC's CEO and The University of Victoria's Human Research Ethics Board (HREB) which granted this project full ethical approval on July 12, 2013.

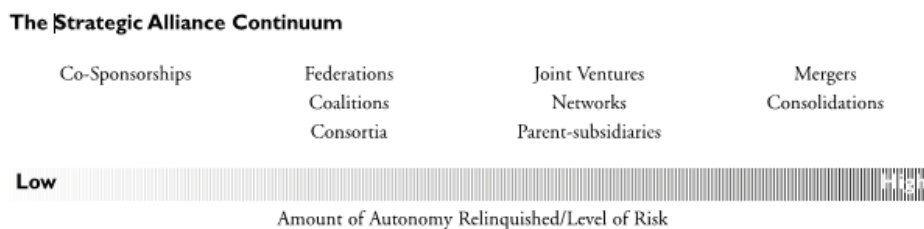
4. FINDINGS: LITERATURE REVIEW AND ANALYTIC FRAMEWORK

This section addresses the report’s first deliverable – to provide a review of literature relevant to non-profit mergers. Due to limited Canadian non-profit merger research, the literature review included books and articles from the US, UK, and Australia as well as a few examples from South Africa, Sweden, and Israel. The review also included public and private sector literature to capture merger dynamics across sectors and decades. Key areas of research including merger definitions, drivers, cross-sector comparisons, stages, benefits, success factors, and challenges are summarized below. Besides providing background information on non-profit mergers, this section also identifies several stage-specific merger success factors which led to the analytic framework guiding this study (see Figure 3) and the survey questions (see Appendix 7). The section concludes by setting out the analytic framework which guides this report.

What is a Merger?

Mergers differ from other organizational relationships based on their degree of risk and interdependence, investment and integration, collaboration, and corporate restructuring (Burke-Robinson, 2000; La Piana Associates, 2004; MacLaughlin, 2010; Yankey, Jacobus & Koney, 2001) (see Figure 1). Categorizations vary, as non-profit mergers are cited as a form of collaboration, strategic alliance, and strategic restructuring (Burke-Robinson, 2000; La Piana Associates, 2008; MacLaughlin, 2010; Yankey et al., 2001).

Figure 1: The Strategic Alliance Continuum



Yankey, J., Jacobus, B., & Koney, K. (2001). *Merging nonprofit organizations: The art and science of the deal*. Cleveland, OH: Mandel Center for Nonprofit Organizations.

Regional laws stipulate whether a union is deemed a merger, consolidation, or amalgamation (Blumberg, 2009; Burke-Robinson, 2000; Jenkins, 2000). In Canada, amalgamations and consolidations typically require the dissolution of both non-profits and establishment of a unified organization (Blumberg, 2009), whereas absorptions involve one organization merging into a dominant organization (Perras, 2005). For the purpose of this report, mergers refer to both consolidations and amalgamations, which are defined as the “combining of two or more organizations to create one new organization” (Benton & Austin, 2010, p. 461). Non-profit mergers may be classified as horizontal, vertical, conglomerate, or concentric (Arsenault, 1998; see Appendix 1 for merger categories, their respective benefits, and examples). This report

focuses on horizontal mergers where organizations providing similar services within the same industry unite to expand programming as this category suits BGCSCBC’s merger process.

Merger Drivers

Research suggests non-profit mergers generally stem from a desire to address fiscal concerns, build organizational capacity, and enhance social impact (Arsenault, 1998; Ferranto & Perryman, 2003; Golensky & DeRuiter, 2002; Jenkins, 2000; Singer & Yankey, 1991; Yankey et al., 2001). Additional non-profit merger motivations include building networks, sector leadership, and membership; exercising advocacy; reducing organizational vulnerability; adapting to client needs; expanding existing partnerships; and increasing opportunities for training, skill development, and accreditation (Cairns, Harris & Hutchison, 2003; Yankey et al., 2001). Although non-profit mergers arise from complex interrelated motivations, some studies explore the significance of particular drivers (Cairns et al., 2003; Campbell, 2009; Golensky & DeRuiter, 2002; Singer & Yankey, 1991; Taylor, Austin & Caputo, 1992; Wernet & Jones, 1992). Primary merger drivers among UK non-profits include achieving efficiencies, rescuing another charity, and increasing service quality by reducing program duplication (Charity Commission, 2003). However, a significant body of research suggests most non-profits merge to increase financial resiliency (Arsenault, 1998; Burke-Robinson, 2000; Cowin & Moore, 1996; Golensky & DeRuiter, 2002; Kohm et al., 2000; Singer & Yankey, 1991). Although unspecified in Canadian literature, pressure from funders is a leading impetus for non-profit mergers in the US and the UK (Cowin & Moore, 1996; Golensky & DeRuiter, 2002; Singer & Yankey, 1991).

Some researchers categorize non-profit merger drivers as either internal or external (Norris-Tirrell, 2001), proactive/reactive (Vergara-Lobo et al., 2005) or arising from decision making and resource availability (Golensky & DeRuiter, 2002). Vergara-Lobo and colleagues (2005) identify two kinds of mergers: proactive mergers when organizations seek to reduce competition, grow, and develop human resources; and reactive mergers to address financial strains and appease other organizations. Unsurprisingly, proactive mergers with internal decisions (Norris-Tirrell, 2001; Vergara-Lobo et al., 2005), anticipatory leadership, and sufficient resources yield more successful outcomes (Golensky & DeRuiter, 2002; see Table 2).

Table 3: Organizational Positions Based on Merger Motivations

	Internal	External
Proactive	Best Position (BGCSCBC)	Moderate Position
Reactive	Moderate Position	Worst Position

Based on findings from Golensky & DeRuiter (2002), Norris-Tirrell (2001), Vergara-Lobo et al. (2005)

Differentiating Public, Private, and Non-profit Sector Mergers

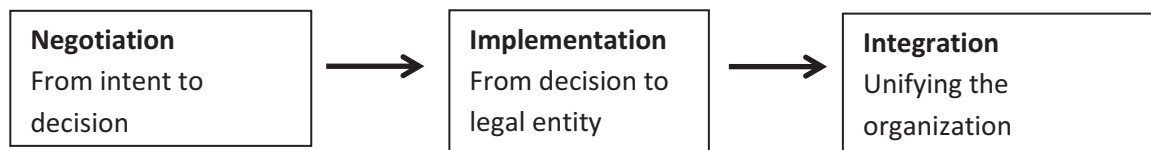
Drivers typically differentiate mergers across sectors (Arsenault, 1998; Golensky & DeRuiter, 2002; Jenkins, 2000; Singer & Yankey, 1991; Yankey et al., 2001). In contrast to corporate mergers, the literature depicts public and non-profit mergers similarly based on low incidence rates and desires to achieve social and financial objectives. Non-profit and public sector merger decisions are often rooted in desires to grow, support survival of another organization, and meet public needs (Dackert, Jackson, Olof & Johansen, 2003; Davies & Rainville, 2004; Jimmieson, Terry & Callan, 2004; Taylor, Austin & Caputo, 1992). However, corporate goals to expand offerings, reduce competition, increase visibility, achieve efficiencies, build intellectual capital, and reduce financial risk (Marks & Mirvis, 1998) can also apply to public and non-profit sector mergers.

Overall non-profit, private, and public sector mergers typically arise from unique motivations yet undergo similar processes, face similar challenges, and – if successful – enjoy similar benefits. Appendix 2 compares and contrasts merger drivers, goals, process, success factors, risks, and potential benefits across sectors.

Merger Stages: Negotiation, Implementation, Integration

Few theories explicitly address non-profit mergers (Benton & Austin, 2010; Chen & Krauskopf, 2012). The limited body of theoretical work mirrors private and public sector merger research and favours process models to interpret merger dynamics (Pietroburgo & Wernet, 2008). While recognizing the iterative nature of change, process models typically involve three or more linear stages which compartmentalize aspects of merger development (Pietroburgo & Wernet, 2008). Although terminology varies, most models cite periods of disassembling past systems, changing, and integrating new organizational patterns. As BGCSCBC’s leadership team applied La Piana’s three-stage merger process model (La Piana Associates, 2004), this report references merger stages of negotiation, implementation, and integration (see Figure 2).

Figure 2: Non-Profit Merger Process Model



La Piana Associates. (2004).

Prior to negotiations, non-profits often complete inter-organizational assessments to explore merger feasibility and evaluate partner compatibility (La Piana Associates, 2004, MacLaughlin, 2010). During the negotiation stage Board members translate merger intentions into decisions by establishing a negotiation committee, planning and conducting negotiations, developing a merger proposal, and endorsing or rejecting the proposal (La Piana Associates, 2004, Marks &

Mirvis, 2010). Although the first merger stage primarily involves Board members and senior managers, developing a plan to address human resource goals facilitates merger success.

Extensive legal changes usually characterize merger implementation (Blumberg, 2009; Burke-Robinson, 2000; Jenkins, 2000). The implementation stage typically ranges from one month to one year and includes the transition from merger endorsement to the establishment of a unified legal entity (La Piana Associates, 2004). General areas of focus during implementation include the initial integration of financial, human resource, information technology, performance measurement, facilities, and management systems.

Similar, but distinct, from merger implementation, the integration phase involves unifying the structural, human resource, symbolic, and political aspects of the merging organizations. Non-profit and for-profit experts agree that successful merger integration requires staff engagement (Marks & Mirvis, 1992; Van Knippenberg, Van Knippenberg, Monden & de Lima, 2002). Tracking staff reactions to change and providing opportunities for involvement enable employees to strengthen their organizational identity, job satisfaction, and organizational commitment (Van Knippenberg et al., 2002).

Barriers and Enablers to Successful Mergers

Since merger outcomes result from complex interactions among staff, leaders, and the organizational environment during each stage, challenges are expected (Benton & Austin, 2010). Key merger challenges include managing emotional issues regarding potential loss of employment/volunteer positions, personal identities, organizational cultures and autonomy; financial threats to both organization's funder and donor bases, costly administrative systems, and the price of integrating organizational infrastructure; and human resource issues such as salary adjustments and re-training (Blumberg, 2009; Jenkins, 2000; Vergara-Lobo et al., 2005). Structural barriers such as financial resources, time, and support from industry professionals also impede non-profit mergers (Gammal, 2007). Poorly managing staff responses to change accounts for the majority of merger failures across sectors (Galpin & Herndon, 2000; Kohm et al., 2000; Marks & Mirvis, 2010; Nguyen & Kleiner, 2003). Canada's unfamiliarity with the merger process, potential benefits, and expected outcomes also presents barriers to merger exploration.

Research suggests the vast majority of non-profits benefit from merger experiences whereas failure rates among private sector mergers have remained stable at approximately fifty percent over the past thirty years (Cartwright & Schoenberg, 2006; Charity Commission, 2003; Marks & Mirvis, 2000; Singer & Yankey, 1991). Although Canadian success rates are unknown, only five percent of UK charities reported merger failure (Charity Commission, 2003). Interestingly, research fails to clearly articulate why non-profit mergers are more likely to report success compared to public and private sector mergers. Yankey and colleagues (2001) suggest that leaders' passion for social impact may motivate leaders to push for success. Similarly, high success rates may be correlated with non-profit motivations to support – versus takeover - failing organizations with similar missions. For example, research suggests non-dominant

organizations involved in non-profit mergers are likely to enjoy benefits of program continuation, mission fulfillment, and capacity building (Kohm et al., 2000). Given non-profit mergers are a fairly recent phenomenon, non-profits may have learned from private sector mistakes. High non-profit merger success rates could also be attributed to liberal definitions of success. Standardized evaluation criteria are required to distinguish overall non-profit merger success from successful/unsuccessful aspects of the merger process.

Achieving merger success requires non-profit leaders to adequately manage each stage of the merger process (Benton & Austin, 2010). Fostering a positive communication climate - including clear descriptions of merger benefits and change processes - influences how staff members identify with the new organization (Bartels, et al., 2006). Unsurprisingly, communicating change-related information to staff, encouraging involvement, and addressing concerns can significantly reduce post-merger challenges and increase employee well-being and job satisfaction (Basinger & Peterson, 2008; Field & Peck, 2003; Jimmieson, Terry & Callan, 2004; Schweiger & DeNisi, 1991).

Appendix 8 organizes merger success factors identified in the literature by author(s), study location, sector, and – when possible - merger stage. These findings suggest similar factors foster merger success across sectors and countries. Success factors are also stage-specific:

- During merger negotiations initial drivers (Golensky & DeRuiter, 2002; Norris-Tirrell, 2001; Vergara-Lobo et al., 2005), communication (Davies & Rainville, 2004; Jimmieson, Terry & Callan, 2004; Taylor, Austin & Caputo, 1992), leadership styles (Kavanagh & Ashkanasy, 2006; Norris-Tirrell, 2001), organizational resources (Golensky & DeRuiter, 2002), and organizational compatibility (Kohm et al., 2000) influence outcomes.
- Merger implementation and integration success factors are similar, since both stages involve re-aligning organizational systems. Key success factors include leadership (Pietroburgo & Wernet, 2008), communication (Jimmieson, Terry & Callan, 2004; Taylor, Austin & Caputo, 1992), staff involvement and satisfaction (Jimmieson, Terry & Callan, 2004; Kavanagh & Ashkanasy, 2006; Kohm, La Piana & Gowdy, 2000), and organizational culture (Cairns, Harris & Hutchison, 2003; Cowin & Moore, 1996; Frumkin, 2003) and identity (Bartels, et al., 2006; Dackert, Jackson, Olof & Johansen, 2003; Taylor, Austin & Caputo, 1992).
- Merger integration also requires sufficient time to manage the psychological and practical elements of change (Pietroburgo & Wernet, 2010; Yankey et al., 2001).

These stage-specific merger success factors inform the analytic framework, survey questions, and overall analysis of findings.

Non-profit Merger Theory & Analytic Framework

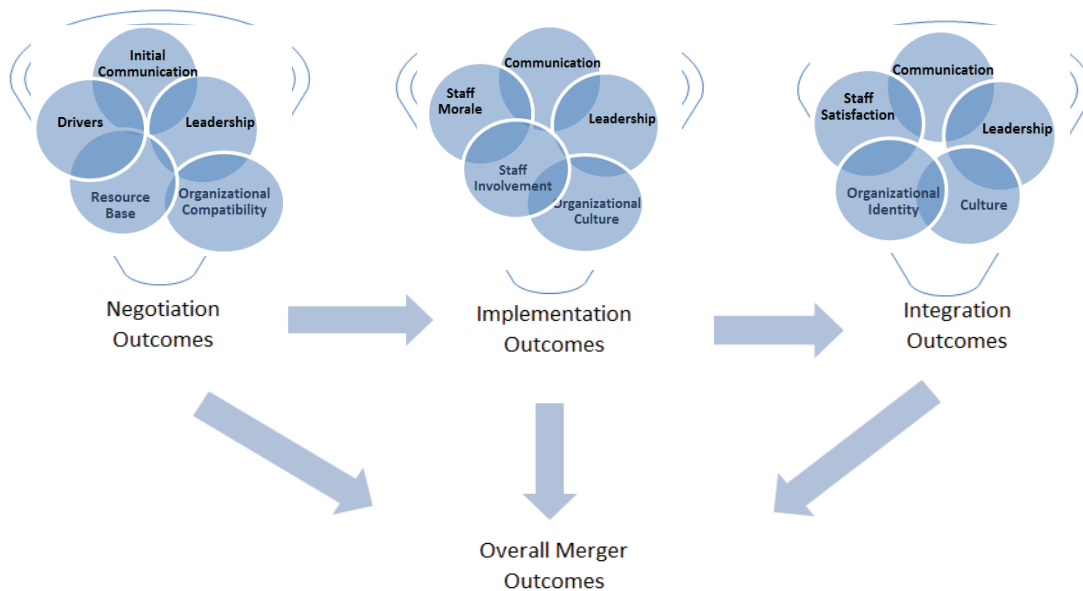
Table 3 summarizes key merger success factors identified via the literature review. These stage-specific merger success factors lay the foundation for the project's analytic framework

Table 4: Stage-specific Merger Success Factors

Negotiation	Implementation	Integration
<ul style="list-style-type: none"> • Merger Drivers • Organizational Compatibility • Organizational Resource Bases • Leadership • Initial Communication 	<ul style="list-style-type: none"> • Leadership • Communication • Staff Involvement • Staff Morale • Organizational Culture 	<ul style="list-style-type: none"> • Leadership • Communication • Staff Satisfaction • Organizational Culture • Organizational Identity

Benton and Austin's (2010) conceptual map of merger dynamics is a sophisticated process model which integrates stakeholder interactions. This model supports previous findings that each stage of the merger process influences merger outcomes (Marks & Mirvis, 2000; La Piana Associates, 2008). Navigating each stage requires leaders to manage interactions among staff and the organization's identity and culture. Figure 3 below showcases an adapted version of Benton and Austin's (2010) model which includes stage-specific merger success factors identified via the literature review (see also Appendix 8).

Figure 3: Analytic Framework



Adapted from Benton & Austin's Conceptual Map of Merger Dynamics (2010).

The overlapping circles depict interactions among stage-specific merger success factors which funnel into stage outcomes. Arrows link merger stages, and the outcomes of each stage, to the ultimate merger outcome. As survey questions address stage-specific merger success factors, findings from surveys and organizational documents will be analyzed and interpreted using the framework captured in Figure 3.

5. FINDINGS: REVIEW OF ORGANIZATIONAL DOCUMENTS

The purpose of this section is to uncover the Joint Merger Committee’s approach to merger negotiations, implementation, and integration. All ten word documents stored in BGCSCBC’s “Our Path” merger folder were reviewed, in addition to three post-merger documents. This section describes the content of these organizational documents by merger stage: negotiations, implementation, and integration.

Stage 1: Merger Negotiations

Merger negotiation documents include the Business Case (Joint Merger Committee, 2009a), Confidentiality Agreement (Joint Merger Committee, 2009b), and Merger Rationale for Boards (Joint Merger Committee, 2009d). The documents address merger negotiation success factors of drivers, organizational compatibility and resources, and leadership planning. Although documents emphasize the significance of organizational culture, BGCGV and BGCCS’ specific cultural dynamics are not described.

The Business Case details strategic recommendations addressing the amalgamation of key organizational areas: human resources; governance and leadership; office administration; accreditation, policy, and procedures; and finance (Joint Merger Committee, 2009a). The Case also outlines provisional post-merger growth targets and risk assessments. By gauging potential impacts on service beneficiaries, fiscal sustainability, and organizational development, the Business Case facilitated the Board’s decision to merge (Joint Merger Committee, 2009a). During negotiations, the Joint Merger Committee also conducted a SWOT analysis to uncover merger-related strengths, weaknesses, opportunities, and threats (see Appendix 9) and developed a set of frequently asked questions to clarify potential stakeholder concerns.

Although the retirement of BGCCS’ Executive Director inspired merger discussions, the impetus to merge stemmed from a desire to enhance mission fulfillment and fiscal sustainability via strategic organizational growth. All merger negotiation documents stress mission-related goals, objectives, and benefits. The AGM Final Merger Agreement (Joint Merger Committee, 2010a) articulates the merger’s goal to “expand service to more children, youth, families and communities by leveraging the strengths, skills and resources of BGCGV and BGCCS” which aligns with desired merger outcomes to protect, enhance, and strategically grow Club programs and services (Joint Merger Committee, 2009a). Documents also frame the merger as a human resource opportunity to “nurture the staff group, engage them in building the new organization and maximize the merger as an opportunity to strengthen the organization’s human resource position” (Joint Merger Committee, 2009a). Table 4 summarizes key findings from archived documents related to merger negotiation.

Table 5: Key Document Findings Regarding Merger Negotiations

Success Factor	Key Document Findings	Documents Analyzed
Merger Drivers	Proactive and internal motivations to build financial, operational, and human resource capacities; enhance and protect programs and services; broaden service reach; increase efficiencies; expand strategic partnerships; and mitigate risks	Business Case (2009)
Organizational Compatibility	<ul style="list-style-type: none"> • Significant compatibility regarding human resources, financial positions, reputations, visions, values, key programs, and organizational sizes • Key differences: specialized services, communities served, and funding models 	Confidentiality Agreement (2009)
Resource Bases	Comparable operating budgets and financial reserves	Rationale for Boards (2009)
Leadership	<ul style="list-style-type: none"> • Commitment to high level governance via policy and performance monitoring • Organized and strategic Joint Merger Committee 	
Initial Merger Communication	<ul style="list-style-type: none"> • Plan to uphold ethical, transparent human resource practices • Plan to develop robust communications strategy 	

The merger negotiation stage ended in June 2010 when the Joint Merger Committee agreed a merger aligned with the mission, stability, profile, and growth philosophies of both organizations.

Stage 2: Merger Implementation

In June 2010, after a year of extensive merger exploration, consultation, and planning, both BGCGV and BGCCS' Boards of Directors declared their intents to merge. Documents addressing merger implementation include the Intent to Merge Letters (Joint Merger Committee, 2009c), Proposal for Pro Bono Legal Support (Joint Merger Committee, 2010c), AGM Final Merger Agreement (Joint Merger Committee, 2010a), and the Implementation Plan (Joint Merger Committee, 2010b) which reference aspects of merger implementation and integration. Table 5 highlights key findings related to each merger implementation success factor.

Table 6: Key Document Findings Regarding Merger Implementation

Success Factor	Key Document Findings	Documents Analyzed
Communication	<ul style="list-style-type: none"> Plan to clearly communicate goals and process of merger to stakeholders Focus on ethical, transparent human resource practices 	Intent to Merge Letters (2009)
Staff Morale	<ul style="list-style-type: none"> Guiding principle: “Relationships are fundamental in Boys and Girls Clubs work, none more important than that of employee/employer” (Joint Merger Committee, 2009a, p. 5) “Implementation planning approach will include a commitment to embed within the process the best attributes of the children that we serve: fun, passion, excitement, resilience, trust and hope for the future” (Joint Merger Committee, 2010b, p. 2) 	Proposal for Pro Bono Legal Support (2010) AGM Final Merger Agreement (2010)
Leadership	<ul style="list-style-type: none"> Joint Merger Committee was directed to work with the CEO of BGCGV, the interim ED of BGCCS, and the senior staff team, to develop the merger implementation plan 	Implementation Plan (2010)
Staff Involvement	<ul style="list-style-type: none"> Ensure the merger is a “non-event” for front-line staff to promote service continuity “A successful merger can only be executed by committing to nurture the staff group, engage them in building the new organization and maximize the merger as an opportunity to strengthen the organization’s position” (Joint Merger Committee, 2010b, p. 2) 	
Organizational Culture	<ul style="list-style-type: none"> Plan to manage the culture of the Board, staff, volunteers, community members, and service recipients Plan to develop “a healthy culture based on ‘best of’ both existing organizations and improvements as identified by staff” (Joint Merger Committee, 2009d, p. 3) 	

These documents address the period after the intent to merge was declared until BGCSBC legally formed. Consequently, documents primarily review legal issues and lay a foundational framework for merger implementation and integration. BGCSBC’s Merger Implementation Plan (2010) clearly outlines how the merged organization will integrate Boards, IT systems, staff, volunteers, properties, culture, legal processes, communications, budgets, and other due diligence tasks. The plan also revisits the guiding principles which are rooted in the value that “relationships are fundamental in Boys and Girls Clubs work, none more important than that of employee/employer.” On April 1, 2011, BGCGV and BGCCS legally amalgamated into BGCSBC.

Stage 3: Merger Integration

The Implementation Plan (Joint Merger Committee, 2010b), Transitions Document (Joint Merger Committee, 2010d) and Transitional Strategic Plan (Joint Merger Committee, 2010e) address BGCSCBC's merger integration *process*; whereas BGCSCBC's 2012-2013 Annual Report (BGCSCBC, 2013a), 2013-2014 Approved Operating Budget (BGCSCBC, 2013b), and 2013-2018 Strategic Plan (BGCSCBC, 2013c) showcase merger integration *outcomes*.

The Transitional Document (Joint Merger Committee, 2010d) touches upon all success factors relevant to merger integration: leadership, staff satisfaction, communication, and organizational culture and identity. The Transitional Document (Joint Merger Committee, 2010d) and Transitional Strategic Plan (Joint Merger Committee, 2010e) outline BGCSCBC's merger integration approach which includes leadership philosophies, guiding principles, and a transitional vision.

The leadership philosophies that were espoused include: seeking first to understand, then be understood; fostering a service culture; sharing leadership; treating the merger as a non-event; ensuring relationships are paramount, particularly that of employee/employer; and promoting fun, passion, excitement, resilience, trust and hope for the future (Joint Merger Committee, 2010d, p. 2). These philosophies demonstrate the Joint Merger Committee's commitment to focusing on human resources during merger integration. The merger's guiding principles are planning and process oriented and include: supporting functional organizational integration, maximizing immediate stability, and creating time and space for thoughtful, long-term organizational planning. The transition vision "to maintain and enhance existing programs and services, continuing planning for future growth, and 'merge well' to build a strong, vibrant and healthy BGC organization that serves those who need us most from 'the sea to Hope' " (Joint Merger Committee, 2010e, p. 1) connects organizational development, staff satisfaction, and mission fulfillment.

Statements regarding organizational culture and identity are also infused with human-focused language. For example, The Transitions Document states "we will embrace the mindset that as leaders, our role is to serve and support those who provide service to children, youth, families and the community" (Joint Merger Committee, 2010d, p. 2). The document also emphasizes upholding a curious, non-judgemental approach to cultural integration: "to build a strong, healthy, vibrant new organization, the leadership team will need to suspend and in some cases abandon our assumptions and preconceived thoughts about each other's organization and intentionally seek to understand and learn about our respective organizations, as if for the first time, in order to objectively discover 'the best of the best' practices, skills, expertise and thinking moving forward" (Joint Merger Committee, 2010d, p. 2).

Table 6 summarizes key document findings related to the merger integration process.

Table 7: Key Document Findings Regarding the Merger Integration Process

Success Factor	Key Document Findings	Documents Analyzed
Communication	Focus on systematic, thoughtful communications plan: “during the first 6-12 months, the leadership group has the opportunity to use our roles in the transitional organizational structure for knowledge transfer, orientation, learning and planning by committing to thorough and systematic communication and therefore minimize the burden of change for “external” individuals” (Joint Merger Committee, 2010e, p. 1).	Transitions Document (2010)
Staff Satisfaction	Emphasis on ethical and transparent human resource practices to maximize employee recruitment, retention, and satisfaction	Transitional Strategic Plan (2010)
Leadership	<ul style="list-style-type: none"> • Guiding principles • Leadership philosophies • Transitional vision 	Implementation Plan (2010)
Organizational Identity	Focus on building a new organizational identity	
Organizational Culture	Focus on fostering a culture of service	

BGCSCBC’s key merger success is increased growth and capacity development across the organization. Specific achievements include enhanced staff expertise, expanded program offerings and service reach, increased annual revenues, and financial resiliency. Table 7 showcases BGCSCBC’s merger outcomes.

BGCSCBC now enjoys a diversified financial portfolio that enables the organization to manage reductions in government funds without cutting programs and services. An increased organization reach has also attracted funders interested in supporting children and youth across the South Coast of BC region via one agency. In turn, new funding streams led the organization to adopt a more robust, integrated IT system available to all staff utilizing Share Point, Microsoft Office, and Microsoft Exchange (Joint Merger Committee, 2010b). As income streams continue to grow, BGCSCBC can continue to invest in organizational development.

Merger successes enable BGCSCBC to serve significantly more children, youth, and families. Between 2010 and 2013, membership across all Clubs rose by 20%. Similarly, daily attendance across all Clubs increased by 34% between 2010 and 2013 (BGCSCBC, 2013a). These increases may be partly accounted for by the opening of two new Clubs: Grandview and Richmond. Interestingly, BGCSCBC managed to opening two new sites *during* the merger which speaks to the organizations ability to thrive during organizational change. Merger related growth is less apparent across BGCSCBC’s counselling, support, and employment programs which adhere to government service targets. However, enhanced staff expertise via cross-program information sharing likely facilitates stronger support services. It is difficult to ascertain increases in camp participation as Camp Potlatch serves as many children and youth as possible each year.

Table 8: Then and Now – Comparing BGCGV, BGCCS, and BGCSBC

	BGCGV	BGCCS	BGCSBC
Staff	Approximately 50 Full-time and Part-time, and 100 Casual/Seasonal (as of April 2011)	Approximately 57 Full-time and Part-time, and 70 Casual/Seasonal (as of April 2011)	329 Permanent Full Time, Permanent Part Time, Seasonal, and Casual (as of May 3, 2013)
Sites and Service Areas	Eight Sites across South Vancouver, East Vancouver, North Vancouver, Burnaby, Langely, Surrey, Sunshine Coast	Eight Sites North Delta, South Delta, Ladner, Tsawwassen, Richmond Surrey	Nineteen Sites across South Vancouver, East Vancouver, North Vancouver, Burnaby, North Delta, South Delta, Langley, Ladner, Tsawwassen, Richmond, Surrey, Sunshine Coast
Centralized Supports/ Infrastructure	Internal fundraising and finance expertise	IT, accreditation, and human resource expertise	Staff may access all centralized supports including human resources and IT
Specialized Services	<ul style="list-style-type: none"> • Volunteer Program • Odyssey 1 & 2; Nexus: Youth Drug and Alcohol Counseling • Camp Potlatch • Parents Together 	<ul style="list-style-type: none"> • Employment programs • Specialized counseling • Youth criminal justice work • Early childhood and family resource centres 	Operates specialized services from both BGCGV and BGCCS Staff expertise enhanced
Annual Revenue	\$4, 453, 773 (2009)	3, 714, 150 (2008)	\$9, 913,000 (2013)
Financial Surpluses as of Spring 2009	Excess of \$7,000,000 in endowment funds via donors	\$500,000 cash reserve gained through efficiencies	Combined financial surpluses from BGCGV and BGCCS
Participation and membership	2, 445 members (2010) 644 daily participants (2010)		2, 932 members (2013) 864 daily participants (2013)

Achieving merger successes required BGCSBC to invest significant time and funds, as merger-related costs surpassed \$1 million. Thankfully BGCSBC secured \$42,000 of legal aid and \$775,000 of IT system upgrades in-kind, leaving \$17,715 for risk management, facilities, and human resource expenses (BGCSBC, 2013a).

Conclusion: Perspectives from Documents

Documents developed by the Joint Merger Committee clearly showcase BGCSCBC's merger goals, process, and outcomes. Merger goals focused on addressing the organization's mission, and transitional documents prioritized staff engagement and shared leadership. As staff satisfaction is intimately linked with service outcomes and client satisfaction (BC Stats, 2010), remaining mindful of staff needs will strengthen BGCSCBC's ability to achieve mission-related goals in the future.

By merging, BGCGV and BGCCS maximized efficiencies, leveraged existing resource, and increased organizational capacity. As BGCSCBC enters a period of post-merger stabilization, the leadership team can focus on meeting deliverables outlined in the 2013-2018 Strategic Plan (BGCSCBC, 2013c). The discussion section will re-examine this approach to BGCSCBC's organizational development in light of survey findings.

6. SURVEY FINDINGS

The following section details findings from a survey issued to all current BGCSCBC staff except seasonal staff via Survey Monkey between July 22 and August 9, 2013. The sample includes 40 of 305 staff members with various organizational roles, hours, and tenure from BGCCS, BGCGV and BGCSCBC. As survey findings reflect only a sample of the overall population of current and predecessor organizations, they should not be seen as representing the views of all BGCSCBC staff members. Table 8 summarizes key survey findings by stage-specific merger success factors. Since organizational documents reviewed merger drivers, organizational compatibility, and the pre-merger resource bases of BGCGV and BGCCS, staff members were not asked to comment on these merger success factors. Last, response themes are described in relation to merger stage.

Stage 1: Merger Negotiations

Pre-merger survey questions addressed stage-specific merger success factors of organizational culture, leadership, and initial merger communication. All but one BGCGV respondent and three BGCCS respondents noted positive pre-merger organizational cultures. The previous organizations were described as close-knit, fun, family-like communities with involved, supportive, and approachable management. Respondents were also satisfied with pre-merger operations within their respective organizations, and described previous leadership teams as communicative, inclusive, and accessible. Surveys did not address organizational finances, and no respondents expressed any fiscal concerns related to the merger. However, five respondents discussed financial diversification as a post-merger achievement. Table 9 summarizes key survey findings regarding merger negotiations.

The majority of respondents perceived initial merger communication meetings, emails, and staff notices as transparent, honest, and informative. Twelve of 13 BGCGV respondents and four of 12 BGCCS respondents were very satisfied with the merger communication process. Three BGCCS respondents expressed some displeasure with initial merger communications, since some information was gleaned via rumors. The remaining five BGCCS respondents did not express opinions, but shared how the merger was communicated (i.e. via emails, meetings, etc.). One comment summarizes BGCCS respondents' thoughts on the merger announcement: "I think it was handled well, we were given information, but a lot came through office talk as well." Although BGCGV and BGCCS respondents appreciated management's focus on the merger communication process, two recent hires and three BGCCS staff desired further clarity on procedures.

Respondents noted several pre-merger organizational challenges including disorganized human resource and administrative systems, a casual organizational culture, low community visibility, few referrals between BGCSCBC programs, limited collaboration among sites, and limited professional development opportunities. These issues were raised by staff from all initial

Table 9: Key Survey Findings Regarding Merger Negotiations

Success Factor	Key Survey Findings	Survey Question
Merger Drivers	N/A	N/A
Organizational Compatibility	N/A	N/A
Resource Bases	N/A	N/A
Organizational Cultures	BGCGV: Vibrant, supportive, family-like, relaxed BGCCS: Small, intimate, community-vibe, professional	7
Leadership	<ul style="list-style-type: none"> • Supportive and accessible supervisors • Enthusiastic CEO • “It was manageable because the leaders made it that way” 	8
Initial Merger Communication	<ul style="list-style-type: none"> • Merger communicated via multiple channels: meetings, emails, and notice board postings • Transparent and open merger communication • BGCCS and BGCSCBC desired further merger information • BGCGV felt merger over-communicated, over-emphasis on merger process versus outcomes 	9

organizations and various roles. These pre-merger challenges were also identified in the Joint Merger Committee’s SWOT analysis as merger opportunities (see Appendix 9).

Stage 2: Merger Implementation

Stage 2 survey questions focused on merger implementation success factors: organizational culture, staff involvement, staff morale, leadership, and communication. With the exception of one respondent, the entire sample was satisfied or very satisfied with their merger involvement irrespective of their level of participation. All BGCGV and BGCCS respondents pointed to positive staff morale and support during merger implementation.

Besides two BGCCS respondents noting ambiguous reporting structures, the vast majority of respondents were very happy with communication processes during merger implementation. One respondent’s comment reflects the tone of responses from all organizational levels and both initial organizations “I received ongoing feedback and communication from the Senior Directors and the CEO which was wonderful both during the transition and as it continues today. The transparent communication and clarity of roles has been a breath of fresh air.”

Two front-line staff from each initial hire organization desired further merger-related information. One commented that “more information would have been beneficial from an interest perspective but not necessary to do my job,” which suggests some staff were merely interested in the merger processes. Another respondent observed that “perhaps this was part of the initial process, but ‘why did the merger happen’ and ‘what benefits will it have’ were never really talked about for those of us hired midway through the process (after April 2011)”

suggests staff hired during merger implementation may not have received as detailed merger updates as previous hires.

Both senior and front-line BGCCS staff suggested personalized communication could have enhanced the merger implementation process. For example, a senior leader notes “in hindsight I wish that I would have [been] more creative and offered more communication to the staff that report to me about the merger changes than I did instead of just including them in the overall staff messaging. I think it would have been better if I would have made an attempt to explore further with them instead of relying on all staff messaging.” Similarly, a front-line staff shared “the leadership team handled it well by keeping staff informed of the procedure. The senior leaders could have handled better by meeting with each team as an individual instead of together.” As no staff hired by BGCGV expressed any concerns or suggestions regarding merger communication, select BGCCS staff may have experienced these challenges. Interestingly, three BGCGV respondents felt the merger was over-communicated.

All but one BGCGV respondent were very pleased with the leadership team’s performance during merger implementation, and noted receiving adequate or excellent support throughout. Leaders were described as passionate, committed, and supportive, and several respondents emphasized the CEO’s leadership as a key strength. One respondent shared “they were really good at creating opportunities for everyone to come together. Senior Leadership letting us know that it was a priority that staff feel good about the merger and creating social opportunities for us to come together.” Except three Directors, all respondents noted limited merger involvement and support. Interestingly, no respondents requested additional support or involvement. Table 10 summarizes key survey findings regarding merger implementation.

Table 10: Key Survey Findings Regarding Merger Implementation

Success Factor	Key Survey Findings	Survey Question
Communication	<ul style="list-style-type: none"> • “lots of communication from upper management” • Some ambiguity in reporting structures • Personalized communication with individual staff members could have been beneficial • Additional merger information due to personal interest desired 	15
Staff Morale	<ul style="list-style-type: none"> • Positive staff morale overall • Culture Club very popular 	15
Leadership	<ul style="list-style-type: none"> • Leadership team answered questions well • Excellent support from leadership • More focus on operations versus process desired 	12, 13, 14
Staff Involvement	<ul style="list-style-type: none"> • Non-event for majority of respondents • Staff satisfied with merger participation 	10, 11
Organizational Culture	<ul style="list-style-type: none"> • Culture Club popular • Desires to continue cultural integration and preserve unique program identities 	15

All but three respondents were satisfied with cultural integration efforts to date, and recognized full integration is a lengthy process. One respondent shared “the two organizations' cultures [are] well on [their] way to being integrated. In my view, due to different leadership, program structure, and old habits, the culture of good communication and working together were very different between the two organizations. This is continually addressed, and I can't think of any ways in which [this] process could have been improved - it is an ongoing process.” Several respondents highlighted the “Culture Club” as an innovative, fun way to develop a healthy inter-organizational culture via staff events. One comment is characteristic of BGCGV and BGCCS responses: “being part of the Culture Club really got me to know the other programs and staff. The events have been ALOT of fun.” However, two respondents from each organization noted differences in organizational cultures and silos remain. Among these respondents, some desired future cultural integration, and some were satisfied with preserving independent organizational cultures among individual programs, sites, and initial organizations.

Although staff appreciated support from leadership during merger implementation, an overemphasis on the merger process – versus outcomes – was a central theme. BGCGV, BGCCS, and BGCSCBC respondents highlighted dovetailing administration, marketing, policies, and procedures as longstanding merger challenges.

Stage 3: Merger Integration

Stage 3 survey questions addressed BGCSCBC's current identity and culture, leadership, communication, and overall staff satisfaction. The BGCSCBC's identity was frequently referenced as “vibrant” and a “service continuum.” One comment that “the organization also has an energy of excitement and growth now that wasn't there before” summarizes responses.

All but three respondents were very satisfied with merger outcomes, and the unified organization's new identity. Staff members highlighted enhanced internal and external organizational communication as significant merger benefits. For example, staff members from BGCCS and BGCGV noted the merger increased internal program coordination which has benefited service recipients. One respondent shared “it is the merger that brought all of the different services together and made many more opportunities possible not only for our families but for us as staff as well.” Respondents also discussed enhanced professional opportunities for staff including networking and role mobility.

Respondents from all initial organizations and roles identified enhanced internal and external organizational communication as a significant post-merger success. Internally, staff appreciated increased inter-organizational knowledge, resource sharing, cross-referrals, and networking opportunities. Staff also valued BGCSCBC's increased branding and community reputation for external audiences. However, six staff expressed frustrations with the lengthy unification of administrative systems.

Two BGCGV respondents, and three BGCCS respondents, noted subtleties in previous organizational cultures including a more relaxed atmosphere among the Vancouver Clubs

compared to the more professionalized Delta programs. Although three BGCSCBC respondents described BGCSCBC’s culture as less intimate, the majority of respondents appreciated the expanded network of resources, services, and professionals. Overall, BGCGV respondents were pleased with the level of cultural integration and professionalized BGCSCBC atmosphere. A longstanding BGCCS staff shared “I think the two organizations actually had two very different cultures and it is surprising how well things have come together anyway. I think that the celebrations of the merger, the update from the CEO and the commitment from leadership to establish connections with their new staff reports has made a difference.” However, three BGCCS respondents perceived an enduring cultural divide between Club and non-Club programs.

When asked to gauge satisfaction among other staff members, previous BGCGV staff cited high levels of satisfaction; whereas BGCCS staff expressed greater uncertainty regarding colleagues’ overall post-merger organizational satisfaction. Several post-merger concerns regarded human resources. Six respondents, including three from BGCCS and BGCGV, emphasized a desire for salary increases, heightened performance standards, and professional development opportunities for staff. As merger integration continues, three respondents suggested BGCSCBC increase supports for supervisors and coordinators. Two respondents also expressed some concerns regarding the organization’s ability to embrace fresh ideas from younger staff. Table 11 summarizes key survey findings regarding merger integration.

Table 11: Key Survey Findings Regarding Merger Integration

Success Factor	Key Survey Findings	Question
Communication	<ul style="list-style-type: none"> Enhanced inter-program communication and referrals Increased communication with external organizations Challenges dovetailing communication processes 	19
Staff Satisfaction	<ul style="list-style-type: none"> Increased job opportunities, expanded networks, enhanced organizational expertise, broader organizational reach Greater acknowledgment of family resource programs desired Requests for salary increases, heightened performance standards, professional development 	16, 17, 19, 20
Leadership	<ul style="list-style-type: none"> High satisfaction with leadership team, particularly the CEO Additional supervisor support desired Emphasizing young and fresh ideas desired in the future 	19
Organizational Identity	<ul style="list-style-type: none"> Strong organizational branding and reputation Increased organizational energy and excitement 	18, 19
Organizational Culture	<ul style="list-style-type: none"> More professionalized culture Cultural integration positive, yet lengthy Some cultural silos remain 	18, 19

All respondents deemed the merger a positive experience that enhanced each organization’s operational, human resource, financial, and service capacities. Overall, both BGCCS and BGCGV respondents were very satisfied with merger outcomes although a few BGCCS respondents expressed hesitant satisfaction. An enthusiastic staff commented: “I am very happy. I feel so

fortunate and proud to work for BGCSCBC.” On the other end of the spectrum, a moderately satisfied staff shared: “in general, it seems to be functioning well - better than when the merger originally happened.”

Key areas of pride included greater program options for service recipients, a heightened organizational profile, enhanced inter-organizational communication, augmented staff expertise, and financial diversification. Respondents from all organizations emphasized BGCSCBC’s superior level of support, teamwork, and communication. One response characterises the sample: “I am satisfied with the way that organization is currently functioning. I like my job, the people that I work with and my supervisor is top notch. I feel like my opinions are respected, my work is valued and the organization is true in its commitment to deliver quality service and programs to our children, youth and families.”

Future Integration Planning

Appendix 11 showcases all responses from the final survey question “over the next year, what key areas do you think the BGC should focus on to ensure ongoing successful merger integration? Do you have any ideas on how these issues can be resolved?” Some respondents were either satisfied with current organizational functioning or provided no insights for improvement. Interestingly, individuals from various positions, tenure, and hire organizations posed similar suggestions. Key themes included: focusing on family resources; increasing program awareness; recognizing staff; building teams and integrating cultures; and enhancing administrative systems, policies, and procedures.

Staff hired by BGCCS made all suggestions related to increasing awareness of family resource programming. This is not surprising given these programs were previously operated by BGCCS. Three BGCCS hires also noted the merged organization’s name references “Clubs” which fosters an implicit emphasis on Club programs. Comments for BGCSCBC leadership to “work on the perception that government funded programs are a second cousin to clubs and camp” and “focus on promoting programs and advertising so the public is aware of all that the BGC does, including clubs, counselling, early years etc.” reveals desires for enhanced program awareness. BGCSCBC leadership recognizes these challenges as the new Strategic Plan highlights investing in marketing, communications, and public relations (BGCSCBC, 2013c).

Six front-line staff expressed concerns regarding staff recognition and wage increases. One respondent suggested BGCSCBC strive to achieve “appreciation for all employees, support, compensation increase, fairness, supervision of managers/supervisors, consistency within all clubs.” However, the majority of survey respondents were very satisfied with BGCSCBC’s human resource practices. For example, one respondent suggested BGCSCBC “continue to honor the creativity of individuals, separate groups, and the grassroots nature of what we do - continue to engage people along with ‘business units’ and you’ll do great.” Cultivating employees as the ‘Champions of Kids’ is a key pillar of the 2013-2018 Strategic Plan (BGCSCBC, 2013c).

Besides salary, recognition, and family resource program concerns, no key differences were apparent based on hire organization, position, or organizational tenure. Respondents from all hire organizations sought further team building opportunities. One comment captures this view: “I think the BGC should continue to focus on having events that build organizational culture. This provides more opportunity for the organization to feel as one.” Interestingly, the majority of respondents expressed desires for both cultural integration and preservation. One respondent summarized this by suggesting that “Clubs merge in a way that makes them the same across the board but also allows for each of them to become their own entity.”

Six respondents called for streamlined administrative systems, policies, and procedures. One response captures this sentiment: “I believe we should concentrate on infrastructure - as much as possible completing policies and procedures and implementing and establishing systems to carry these out. With this comes the concentrated effort to re-orient all staff on new systems and procedures, and support them in changes.”

Conclusion: The Merger Process in Perspective

Overall BGCSCBC leadership facilitated a successful merger process. A review of relevant documents show that the Joint Merger Committee methodically undertook due diligence, merger negotiations, implementation plans, and a path towards organizational integration.

Although the vast majority of respondents were satisfied with BGCGV and BGCCS’ organizational dynamics, many expressed desires for an increasingly professionalized organizational culture, heightened community visibility, increased inter-program communication, employee development opportunities, and organized administrative systems. Interestingly, the Joint Merger Committee cited these challenges as merger motivations (see Appendix 9). Post-merger, several respondents identified these areas as successes in addition to an amplified organizational energy; increased role mobility, networking opportunities, and staff expertise; and a greater capacity to serve children, youth, and families.

Survey findings suggest the vast majority of respondents from all organizational levels and affiliations were very satisfied with BGCSCBC’s merger process and outcomes. Respondents particularly appreciated the leadership support, transparent communication, and ability to participate in the merger to the degree it influenced their role. Key staff recommendations for future organizational development included: building teams and integrating cultures; enhancing administrative systems, policies, and procedures; increasing awareness of programs and services; focusing on family resources; personalizing communication; and recognizing staff.

The following section compares findings from organizational documents and surveys to uncover merger successes and recommendations for organizational development.

7. DISCUSSION

This section reviews and analyzes findings from previous sections and identifies cross-cutting themes. Each sub-section reviews aspects of merger development that were addressed well, areas that could have been handled differently, and challenges to address moving forward. Comparing document and survey findings showcases how the Joint Merger Committee's plans translated into lived merger experiences for BGCSBC staff. The merger outcomes sub-section highlights merger successes according to organizational documents and survey responses. This subsection also reviews suggestions for future organizational development according to survey respondents and objectives identified in BGCSBC's 2013-2018 Strategic Plan. The section concludes by highlighting the key strategic challenge facing BGCSBC after the merger.

Merger Negotiations: An Excellent Start

With significant organizational compatibility, proactive merger drivers, and strong resource bases BGCGV and BGCCS entered merger discussions poised for success. By establishing a Joint Merger Committee, and developing a comprehensive package of merger negotiation and planning documents, BGCSBC further strengthened the likelihood of a successful merger process. The Joint Merger Committee's strong focus on ethical, fair, and transparent human resources practices is impressive. This human resource philosophy set the tone for the merger process, and will influence future integration planning. No positions were lost as a result of the merger, which likely influenced staff perceptions of the merger process. However, this should not undermine the value of BGCSBC's comprehensive planning, and commitment to ongoing staff engagement and support.

Interestingly, some respondents noted the leadership team invested too much time in staff communication, which attests to BGCSBC's thorough merger communication process. This is essential given research findings that direct access to merger-related information substantially impacts how staff experience the merger and perceive merger outcomes (Basinger & Peterson, 2008). Based on a few negative comments from BGCCS respondents, BGCSBC could revisit how merger related information was communicated to BGCCS staff. However, the vast majority of BGCCS and BGCGV respondents were satisfied or extremely satisfied with the merger communication process. Among merger negotiation survey questions, no additional themes specific to organizational position, tenure, or hire organization emerged. As merger negotiations typically consist of limited or no staff involvement, these findings are not surprising.

Overall, the Joint Merger Committee's thorough merger planning addressed all merger negotiation success factors. Accordingly, the vast majority of survey respondents were very satisfied with leadership and communication during merger negotiations. Although some cultural integration challenges remain, high overall inter-organizational compatibility likely contributed to a successful merger negotiation stage. Success during merger implementation and integration may be attributed to BGCGV and BGCCS leaders' rigorous due diligence process during merger negotiation.

Merger Implementation: A Successful Stage with Minor Hiccups

Seeking pro bono legal support and preparing legal merger documents further attests to the Joint Merger Committee's due diligence process. Although merger implementation typically focuses on legal matters, the Implementation Plan also outlined BGCSCBC's merger philosophy toward the change process (Blumberg, 2009; La Piana Associates, 2011). Research suggests managing the human element of change accounts for the majority of merger failures across sectors (Galpin & Herndon, 2000; Kohm et al., 2000; Marks & Mirvis, 2010; Nguyen & Kleiner, 2003). By articulating the leadership team's plans to involve staff, maintain morale, address cultural issues, and communicate effectively, BGCSCBC was prepared to address merger implementation challenges.

As outlined in BGCSCBC's Transitional Strategic Plan, the majority of respondents referenced the merger as a 'non-event' which did not significantly interrupt staff routines (Joint Merger Committee, 2010e). Respondents with more senior roles did discuss assuming additional operational tasks. This is not surprising given mergers require immense operational and administrative re-coordination (La Piana Associates, 2008). It is impressive merger leaders upheld a service-focused environment during profound organizational adjustments.

Although the merger did not significantly impact the majority of staff roles, some respondents noted cultural shifts arising from organizational growth. One front-line BGCGV hire commented that the merger "did not impact my work routine, besides the all staff meetings, I am not as comfortable in larger crowds, the only impact for me has been during these as I find it harder to get to know people, share in front of the group and I feel like meetings are more 'down to business' now." Another program staff hired by BGCCS observed that "the organization started feeling a bit more bureaucratic post-merger; which was somewhat expected. The chain of command grew somewhat and it was unclear who we should call when specific issues came up; our coordinator was often misinformed about who was in charge of specific club issues." However, the vast majority of respondents were very satisfied with the merger implementation process regarding communication, support, leadership, and overall processes. These comments may reflect challenges resolved during merger integration, as most respondents were satisfied with BGCSCBC's post-merger organizational growth, professionalized culture, and heightened reputation.

Research suggests staff members' post-merger satisfaction is highly influenced by individual involvement (Basinger & Peterson, 2008; Field & Peck, 2003; Jimmieson, Terry & Callan, 2004; Schweiger & DeNisi, 1991). Interestingly, staff members' level of participation in the merger process, seniority, and hire organization did not impact responses as 39 of 40 respondents were satisfied with their level of participation. This likely stems from the fact that staff from various positions and hire organizations reported excellent support during merger implementation.

One area BGCSCBC could retrospectively revisit is merger communication. Interestingly, the vast majority of BGCGV respondents requested *less* merger communication whereas few BGCCS respondents requested *more* merger information. These findings align with comments from

senior and front-line BGCCS staff that personalized merger communication could have positively impacted merger implementation.

Survey and document findings suggest BGCSCBC leaders facilitated a smooth merger process by actively involving and communicating with staff. Moving forward, BGCSCBC can focus on mastering cultural integration and personalizing communication processes.

Merger Integration: A Strong Finish with Lingering Challenges

Developed during 2009 and 2010, BGCSCBC documents exhibit an impressive level of detail for merger integration activities scheduled until 2013. References to popular change management literature within the Transitions Document (Joint Merger Committee, 2010d) and Merger Resource Bibliography suggest the Joint Merger Committee recognized the iterative nature of change and value of guiding employees through the merger process. These principles are reflected in the ongoing revision of merger planning documents such as the Implementation Plan (Joint Merger Committee, 2010b).

The vast majority of respondents from various BGCSCBC positions, hire organizations, and tenures reported strong satisfaction with BGCSCBC's new identity. These findings are not surprising given both founding organizations shared vision and values statements, operated under similar organizational names, and held BGCC affiliate status. However, survey findings suggest some staff members perceive a divide between Club and non-Club services. Moving forward, BGCSCBC can work on integrating both Club and non-Club services into the new organization's image and identity.

In light of overall satisfaction with both the merger process and outcomes, staff mentioned several merger integration challenges including embracing fresh ideas from young leaders as a post-merger challenge. One comment touches upon of post-merger leadership strengths and challenges - "Carolyn is brilliant and a great leader. There are truly some great people here which make the overall organization great I think. There are also some in key positions who stifle growth, creativity, and younger team members." Many staff members from both initial organization and various positions stressed their satisfaction with BGCSCBC's senior leadership team. These comments are not surprising given the Joint Merger Committee's detailed and thoughtful merger planning documents which stress staff support. BGCSCBC is now positioned to leverage the current leadership team's assets to develop succession plans and explore creative ways to engage young leaders.

A few front-line staff hired by BGCGV, BGCCS, and BGCSCBC suggested that Coordinators and Supervisors could have benefited from increased support and supervision during merger integration. Interestingly, the merged organization's revised organizational chart includes additional support for senior managers via Department Director roles. A few respondents in senior leadership roles appreciate this shift; however, front-line staff from BGCGV noted coordinators require additional support. BGCSCBC can monitor the needs of first-tier supervisory staff to gauge how to adequately support staff in the new organization structure.

Another consistent theme pointed to blending BGCGV and BGCCS cultures while preserving unique elements of various programs and services. The vast majority of all respondents were very satisfied with BGCSCBC's cultural integrated efforts to date. One respondent observed that "I feel that there were differences in the two of how they were managed (i.e. clubs) but at the same time I feel like the best of both were and have been combined," which characterizes BGCGV and BGCCS responses. A few respondents hired by BGCCS expressed concerns that the culture of family resource programs were not captured by the organization's identity and community reputation. However, the most common requests from both BGCGV and BGCCS hires related to continued organizational integration via the Culture Club. This suggests the majority of respondents from both hire organizations would appreciate increased opportunities for cross-program interaction.

Many staff members perceived the larger merged organization as more professionalized and organized. BGCGV staff particularly valued organized administrative and human resources systems despite delays in inter-organizational integration. Although a few staff members expressed concerns regarding over-bureaucratization based on the merged organization's size, the vast majority of respondents from BGCCS, BGCGV, BGCSCBC and various organizational roles were very satisfied and proud of BGCSCBC's more professional image and streamlined human resource procedures. For example, one staff member shared "my fear was that the intimacy would be lost and it hasn't really felt like that. Now part of a bigger agency that allows people to have opportunities in both sides of the agency." These comments, among others, suggest staff members from multiple organizational layers and various hire organizations recognize merger benefits. However, maintaining a professional yet personalized organizational culture will require ongoing attention.

Overall, BGCSCBC led a successful merger integration process. The next sub-section reviews BGCSCBC's merger outcomes.

Merger Outcomes: A Successful Process Yields Promising Results

Table 12 on the next page summarizes BGCSCBC's merger outcomes based on findings from organizational documents and surveys. Outcomes include successes and recommendations for organizational development.

As recommendations for development may the not represent the opinions of all current BGCSCBC employees, BGCSCBC should remain mindful of individual comments and consider suggestions posed by multiple respondents. Interestingly, BGCSCBC leadership and survey respondents identified similar suggestions for development.

Table 12: Merger Outcomes: Key Successes and Recommendations for Development

Source	Successes	Recommendations for Development
Surveys <i>(Staff Perspective)</i>	<ul style="list-style-type: none"> • Increased organizational energy and excitement • More professional organizational culture • New networking opportunities • Increased role mobility • Increased coordination among existing programs and services, including more cross-program referrals • Increased staff expertise • Greater presence in communities served • Greater capacity to serve children, youth, and families 	<ul style="list-style-type: none"> • Build teams and integrate cultures • Increase awareness of programs • Enhance administrative systems, policies, and procedures • Enhance human resource systems and recognize staff • Personalize communication
Organizational Documents <i>(Leadership Perspective)</i>	<ul style="list-style-type: none"> • Larger staff team • New, robust IT systems • Diversified funding sources • Enhanced financial reserves • Enhanced reputation • Broader service reach • Greater capacity to address mission and organizational development 	<ul style="list-style-type: none"> • Cultivate employees as ‘Champions of Kids’ • Invest in marketing, communications and public relations • Explore additional and innovative partner and donor relationships • Measure and evaluate impact

Post-Merger Organizational Development: BGCSCBC’s 2013-2018 Strategic Plan

BGCSCBC released their 2013-2018 Strategic Plan on April 10, 2013. It states that BGCSCBC’s central goal is “to become the Champion of Kids” (BGCSCBC, 2013, p. 2). It plans to accomplish this goal by focusing on three areas: bringing the voices and needs of kids to life, extending membership, and extending counselling services. Compared to the Transitional Strategic Plan, the new plan’s guiding principles of quality, thoroughness, impact, a solution-orientation, and inclusivity focus on outcomes versus process.

To become the Champion of Kids, the Plan proposes four inputs: cultivating staff; investing in marketing, communications, and public relations; exploring innovative partner and donor relationships; and evaluating impact (BGCSCBC, 2013c). Leveraging each input requires staff engagement. Cultivating staff as ‘Champions of Kids’ is also identified as the primary input – this represents the key strategic challenge facing BGCSCBC after the merger. The Plan notes BGCSCBC can address this challenge by investing in qualified, passionate employees, improving remuneration, providing professional development and advancement opportunities, and elevating staff into desired and respected careers. These strategies align with survey

respondents' recommendations to increase wages for front-line staff and professional development opportunities.

BGCSCBC's new Strategic Plan suggests the organization is moving past merger integration, and re-focusing on mission-related objectives. The next section reframes findings in light of BGCSCBC's Strategic Plan.

Conclusion: Looking Beyond a Successful Merger

Findings from surveys and organizational documents suggest that BGCSCBC completed a successful merger. Overall, BGCSCBC is in a strong position to wrap up loose ends and lead an integrated, high-impact organization. It is time for BGCSCBC to move past the merger, and focus on future organizational development to address strategic priorities. The key challenge facing BGCSCBC leadership is determining how to position the organization to best address staff-identified challenges and the Strategic Plan's objectives (BGCSCBC, 2013c). Tackling this challenge will require leaders to invest in cultivating employees as 'Champions of Kids'.

Non-profit mergers are lengthy processes which require significant funds, and some staff-identified challenges result from the time required to secure financing (La Piana Associates, 2008; MacLaughlin, 2010; Yankey, Jacobus & Koney, 2001). Examples include unifying administrative systems, implementing new IT systems, launching a new website, and revising policies and procedures. When the financial benefits of the merger are realised, funds can be allocated to address these challenges. A heightened post-merger financial position will also enable BGCSCBC leaders to revisit staff compensation per the 2013-2018 Strategic Plan (BGCSCBC, 2013c). Options for BGCSCBC's future organizational development do not address these minor issues. Instead, options incorporate key staff recommendations to enhance staff recognition; personalize communication; integrate cultures and build teams; and increase program awareness. These recommendations align with merger integration success factors of staff satisfaction, communication, cultural integration, and organizational identity.

The following section outlines three approaches BGCSCBC leadership could employ over the next year to cultivate employees as 'Champions of Kids' in order to address staff recommendations and Strategic Plan objectives.

8. OPTIONS

This section proposes three options for BGCBC to consider implementing over the next year in order to address lingering staff challenges and cultivate employees. As non-profit merger research favours a human resource approach to organizational integration, additional perspectives on post-merger strategic planning are not explored (Bartels, Douwes, Jong & Pruyn, 2006; Basinger & Peterson, 2008; Cowin & Moore, 1996; Jimmieson, Terry & Callan, 2004; La Piana Associates, 2008). Consequently, the options presented below do not represent unique theoretical perspectives, but rather, centre on varying levels of commitment to organizational development.

Each option includes specific strategies requiring varying degrees of staff engagement, reach, leadership support, time, and funds. All strategies are derived from staff suggestions for organizational development, and align with non-profit merger success factors. They include:

1. **Creating ‘a good place to be’:** This option represents a limited approach for BGCBC to address lingering staff challenges over the short term. Three strategies are proposed for immediate implementation which build upon existing processes, require limited leadership support and funds, and may yield moderate engagement across the organization.
1. **Creating ‘a great place to be’:** This option represents a moderate approach for BGCBC to address staff challenges and cultivate employees over the next year. The option includes ongoing strategies and new projects which require moderate costs and leadership support, and may yield moderate-high staff engagement and reach.
2. **Creating ‘the place to be’:** This option involves new ongoing projects requiring moderate leadership support and funds. This comprehensive option package may yield the highest staff engagement and reach for BGCBC over the long-term.

The following criteria are used to weigh options:

- **Staff Engagement:** Refers to the degree to which the strategy actively involves staff members. As staff engagement is correlated with staff satisfaction (BC Stats, 2010), high staff engagement is desirable.
- **Reach:** Refers to the approximate number of staff members affected by the strategy. A broad reach is desirable.
- **Leadership Support:** Refers to the amount of time required from senior staff members to implement the strategy. Although leadership time is valuable, a strategy with broad reach and high staff engagement may warrant significant leadership time.

- **Costs:** Refers to financial costs associated with implementing the strategy. The most affordable option is not necessarily the most desirable, but costs will enable BGCSCBC's leadership team to assess the viability of implementing the option during the short or long term. Costs are referenced as follows: Low = up to \$5,000, Moderate \$5,000-\$10,000, and High = \$10,000+
- **Timeline:** Refers to the length of time required to implement the option (i.e. 3 months, one year, etc.).

Options are reviewed in more detail below, and then compared together against the criteria in a summary table.

Option 1: Creating 'a good place to be' – addressing lingering staff concerns in the short term

Option 1 represents a modest approach to address current staff challenges. No new initiatives are proposed as all activities build upon current BGCSCBC activities, require limited leadership support and nominal budgetary increases, and facilitate moderate staff engagement and wide reach.

Completing the new website would represent BGCSCBC's first step towards increasing program awareness. By showcasing Club services, Camp Potlatch, counselling and support services, and employment services via four equal sized icons, the website visually addresses concerns to raise awareness of non-club services. As the website is nearly complete, this option will require nearly no leadership support besides minor communications with IT staff. BGCSCBC budgeted \$6,000 for web development (Joint Merger Committee, 2010b), and no additional funds are proposed under this option. Although all staff can access the website, the site does not yet provide opportunities for meaningful employee interactions.

BGCSCBC would continue to task the Culture Club with addressing lingering team building and cultural integration challenges. By planning organization-wide events, the Culture Club would engage all staff exhibiting wide reach. As some survey respondents insinuated Club events had been discontinued, and others praised Club events, staff are likely moderately engaged in current Culture Club activities. The Culture Club would continue to function with limited funds and leadership support.

To recognize staff the leadership team would add a merger celebration element to the annual holiday party in February 2014. As party plans are underway, timing is ideal for BGCSCBC to embellish the event with tokens of appreciation for staff such as small gifts, a more elaborate food and beverage selection, and/or a larger venue. The party would also serve as an opportunity for leadership to announce merger successes and any additional staff supports (i.e. office hours, new website, etc.). By using the holiday party as a vehicle for merger celebration, BGCSCBC can limit the costs and time associated with planning a separate event. Based on personal interactions, staff may experience moderate engagement at the event. All staff would

be invited to attend the holiday party, but the budget is based on 200 attendees (assuming no seasonal staff attend, all full time and part time attend, and some casual staff attend). The celebration event is budgeted at \$1,000 based on \$5/attendee.

BGCSCBC leadership could implement Option 1 almost immediately. Continuing the Culture Club requires no additional planning, and 2014 holiday plans and website upgrades are underway. Although the new website and Culture Club are ongoing activities, neither requires significant investments of time, leadership support, or funds. If selected, the impact of Option 1 activities may peak during February 2014 after staff members adjust to the new website and experience the holiday party. Although this option is the simplest to implement, it also yields limited short-term and long-term engagement opportunities for staff.

Implementation Timeline: 3 months

Estimated Cost: \$1,000

Option 2: Creating 'a great place to be' – cultivating employees over the next year

Option 2 exhibits greater reach and staff engagement than Option 1, and represents a more significant investment in cultivating employees. As a moderate approach, Option 2 requires more financial and leadership investments compared to Option 1 yet less than Option 3. Recommendations include new and ongoing activities for BGCSCBC to pursue.

To personalize staff-leadership communication, The CEO would set aside one afternoon per month for staff office hours. During office hours, any staff member could privately meet with the CEO to express new ideas or voice challenges. Although office hours would be available for all staff, only few staff could book visits each month yielding limited reach. However, select staff would experience high engagement. Besides the CEO's time, office hours incur no additional costs and can be implemented immediately.

The leadership team would build the Culture Club's visibility and capacity by recruiting new members and increasing the group's budget. An annual budget of \$6,000 includes six events for up to 200 staff at \$5 each. Surveys reflected excellent staff perceptions of the Culture Club, which suggest additional staff may be interested in joining the group. The leadership team would help the Club develop a Terms of Reference and set specific objectives to align with goals of engaging more staff, promoting inclusivity, building teams, and integrating cultures. This option requires moderate leadership support and funds, and may yield high staff engagement and reach.

BGCSCBC would increase program awareness among staff and external stakeholders by developing short films showcasing individuals programs. Due to the confidential nature of some BGCSCBC services, some programs may use graphics or text versus interviews or program photos. A videographer student could develop the films with support from a BGCSCBC staff from each program. Films could also serve as a creative addition to grant proposals and

fundraising events. Film development would engage staff involved, reach all staff members, and incur nominal costs with limited leadership support. Besides staff time, this process will cost approximately \$1,000 for film equipment and a videographer honorarium.

Hosting a specific merger celebration to recognize staff could be the Culture Club's next event. As the annual holiday party is set for February 2014, this event could be a casual social or simple catered lunch to ensure staff members are fully recognized for their exceptional work during the merger. This event would exhibit broad reach and high engagement while incurring moderate costs and leadership planning. Based on 200 attendees at \$10 each, the event would cost \$2,000.

BGCSCBC can begin implementing office hours and the Culture Club as early as December 2013, and continue these activities over the next year. Filming and editing films across 19 sites could also span the course of one year depending on videographer and staff availability.

Implementation Timeline: 1 year

Estimated Cost: \$9,000

Option 3: Creating 'the place to be' – investing in a long-term human resource strategy

Option 3 represents a comprehensive human resource strategy, and requires significant financial resources and leadership time. This option package encourages the highest staff engagement and reach over the long-term. All Option 3 strategies include new initiatives for BGCSCBC to implement on an ongoing basis.

The leadership team would develop a staff communication platform via the website. The platform could include forums for staff to share ideas, comments, concerns, program updates, and staff recognitions. This option would require moderate costs depending on the selected IT platform and simultaneously address multiple staff-identified challenges. Although all staff could utilize the platform, online activity may yield less engagement than in-person office hours. A \$2,200 budget is based on a \$100/month IT platform for one year, and 20 hours of \$50/hour IT services.

To cultivate team building, BGCSCBC would host an annual staff retreat at Camp Potlatch. The retreat could take place over 2 days and include a balance of leisure and professional development activities per staff suggestions. The Culture Club would serve an integral role in retreat planning. This option requires high costs and significant leadership planning, but may meaningfully engage all staff. Total costs of \$9,000 include three meals for two days for 200 staff, \$10/staff in transportation, \$500 of facility maintenance/utilities, and \$500 for a workshop facilitator.

"Take a Peer to Work Day" would pair each BGCSCBC staff member with a peer from another program. The leadership team would set dates for all staff to shadow a peer for the day. This program would address staff requests for enhanced program awareness, professional development, and team building. The program also exhibits high staff engagement and reach

without incurring additional costs or requiring significant leadership support. Dates may vary to accommodate remote programs and confidential services.

BGCSCBC leadership would develop an annual awards program to recognize staff. Staff would nominate candidates throughout the course of the year for exceptional performance in each program area with presentations held during the holiday party. Awards could include formal recognition (i.e. a certificate/plaque/website spotlight) in addition to a small personal gift. This option requires moderate funds to purchase gifts, and some leadership support to collect award nominations and determine recipients. Although all staff could nominate colleagues, only select staff would be engaged in the award process. Award costs are estimated at \$1,900/year based on one \$100 award/site.

Option 3 recommendations include new ongoing activities which require significant time to organize, and substantial funds. Option 3 lends itself well to a long-term organizational development plan.

Implementation Timeline: Over 1 year

Estimated Cost: \$13,100

Table 13 summarizes the options for BGCSCBC to consider implementing over the next year.

Table 13: Options for BGCSCBC to Consider

Merger Success Factor	Staff Identified Challenge	Option 1: Creating a good place to be	Option 2: Creating a great place to be	Option 3: Creating the place to be
Communication	Enhance communication systems	N/A	Offer monthly office hours for staff	Develop an online staff communication platform
Organizational Culture	Build teams and integrate cultures	Continue the Culture Club	Increase the Culture Club's capacity	Host an annual staff retreat
Organizational Identity	Increase program awareness	Update and launch the new website	Develop program awareness videos	Initiate "Take a Peer to Work Day"
Staff Satisfaction	Enhance staff recognition	Embellish the 2014 holiday party	Plan a separate staff celebration	Establish a staff awards program

Comparing the Options

Table 14 compares the options for consideration based on the criteria mentioned above: staff engagement, reach, leadership support, time, and costs. Appendix 12 compares individual strategies within each option and includes budgetary details.

Table 14: Evaluating Options for Consideration

	Level of Staff Engagement	Potential Reach	Level of Leadership Support	Cost	Timeline
Option 1: Creating a good place to be	Low-Moderate	High	Low	Low (\$1,000)	3 months
Option 2: Creating a great place to be	Moderate - High	Moderate-High	Moderate	Moderate (\$9,000)	1 year
Option 3: Creating the place to be	High	High	Moderate	High (\$13,100)	Over 1 year

Recommended Option

Option 2 is recommended as the strategic focus for the next year because it represents a moderate approach to engaging staff and addressing organizational challenges. This option package requires moderate funds and leadership support, yet facilitates moderate-high staff engagement and reach. By investing funds in a staff celebration, a more prominent Culture Club, staff office hours, and program awareness videos BGCSCBC can continue to address staff needs. Option 2 strategies also lend themselves to a one-year implementation timeline.

Option 1 is not recommended as survey respondents provided suggestions for organizational development, and staff may expect the leadership team to establish a human resource strategy beyond the status quo. Option not only builds upon current BGCSCBC practices, but introduces new initiatives. By implementing the new human resources strategies outlined in Option 2, BGCSCBC leadership can showcase their commitment to respond to staff feedback and prioritize staff needs.

Option 3 may foster high staff satisfaction; however, it would require more intensive leadership support and financing. Surveys results also suggest a comprehensive approach is not essential at this time given respondents' overall satisfaction with current BGCSCBC operations. Consequently, a moderate approach is required over the next year to address linger staff concerns and invest in cultivating employees. After one year, BGCSCBC's leadership team can gauge the impact of Option 2, and consider Option 3.

9. IMPLEMENTATION PLAN

In order to cultivate employees and address lingering staff concerns, BGCSCBC must invest in several human resource strategies over the next year. This section outlines an implementation plan for BGCSCBC to pursue over the next year based on the recommended Option 2. Stages include getting organized, implementing Option 2 strategies, and assessing progress and planning for the future. Table 15 outlines key implementation stages including tasks, individuals responsible, timelines, and costs. Appendix 12 includes budget details.

Table 15: Implementation Plan

Tasks	Individual(s) Responsible	Ideal Timeline	Approximate Costs
<i>Getting Organized</i>			
<ul style="list-style-type: none"> Review report and select option to pursue 	CEO & Board	Dec. 2013	N/A
<i>Implementing Option 2 Strategies</i>			
<ul style="list-style-type: none"> Communicate office hours initiative to staff 	CEO	Dec. 2013	CEO time
<ul style="list-style-type: none"> host office hours 	CEO	Dec. 2013-Nov. 2014	
<ul style="list-style-type: none"> Meet with Culture Club to gauge needs over next year Review needs with Leadership team Secure Culture Club resources 	CEO, LT, CC	Dec. 2013	\$9,000/year
<ul style="list-style-type: none"> Host Culture Club Events 	CC	Jan. 2014-Nov. 2014	
<ul style="list-style-type: none"> Meet with Culture Club to brainstorm event ideas Secure resources for event Communicate event details to staff 	LT & CC	Dec. 2013-Jan. 2014	Staff Time
<ul style="list-style-type: none"> Host event 	CC	Jan. 2014	
<ul style="list-style-type: none"> Secure videographer and staff volunteers 	LT	Jan.-March 2014	\$3,000
<ul style="list-style-type: none"> Create films 	Staff & Videographer	May-July 2014	
<ul style="list-style-type: none"> Review and edit films 	Videographer, LT, CEO	Aug.-Sept. 2014	
<ul style="list-style-type: none"> Films released 	CEO & LT	November 2014	
<i>Assessing Progress & Planning for the Future</i>			
<ul style="list-style-type: none"> Review progress Revise strategic plan 	CEO & LT	Nov.-Dec. 2014	N/A

LT = Leadership Team, CC = Culture Club

Stage 1: Getting Organized

First, BGCSCBC's CEO and Board should review this report and determine which Option to pursue. Table 15 assumes BGCSCBC leadership pursues Option 2.

Stage 2: Implementing Option 2 Strategies

Stage 2 involves implementing all Option 2 strategies. The CEO can immediately communicate the office hours initiative to staff via email, and begin office hours during December 2013. The senior leadership team can begin building the Culture Club's capacity by meeting with Club members to determine 2014 funding and support needs. During these meetings, BGCSCBC leadership can confirm the Culture Club's plans for a merger recognition event and the 2014 Holiday Party. This process could commence as early as December and be finalized in January 2014. Appendix 12 provides an approximate annual Culture Club budget of \$9,000 and celebration event budget of \$3,000.

Developing program awareness videos will require support from the leadership team, a videographer, and 1-2 staff from each program. BGCSCBC leadership could begin approaching videographers and staff volunteers in January 2014. Developing video content, filming, and editing could span the course of 2014 depending on staff and videographer availability.

Stage 3: Assessing Progress and Planning for the Future

During November 2014, BGCSCBC's CEO and Leadership Team should assess progress achieved over the past year. Assessing progress may involve disseminating a short survey to all staff members requesting feedback on each implemented activity, and recommendations for future organizational development. Survey feedback will enable BGCSCBC leadership to revise the 2013-2018 Strategic Plan, and consider pursuing Option 3 recommendations to create the place to cultivate 'Champions of Kids.'

10. CONCLUSION

The purpose of this report was to document and analyze current BGCSCBC employees' merger experiences from April 1, 2011 onwards, and recommend strategies to promote successful organizational development over the next year. Answering these questions required an analysis of merger literature, a review of organizational documents, and a survey issued to current BGCSCBC staff. Documents and surveys were reviewed using an analytic framework comprised of stage-specific merger success factors derived from a review of leading public, non-profit, and private sector merger research. According to organizational documents and survey results, BGCSCBC led a successful merger process yielding positive outcomes.

Throughout the merger process, BGCSCBC leadership placed staff satisfaction at the centre of organizational development. The Joint Merger Committee developed a robust merger planning package which addressed merger success factors related to negotiations, implementation, and integration. Moreover, findings from organizational documents and surveys suggest BGCSCBC thoughtfully involved staff throughout the merger process; maintained consistent communication; upheld open, honest, and ethical human resource policies; and promoted a fun and supportive culture for organizational growth. It is not surprising the amalgamated organization enjoys a diversified funding portfolio, significant financial resources, increased human resource capacity, and enhanced program breath and service depth.

Although survey respondents were very satisfied with overall merger outcomes, merger integration may be likened to computer upgrading as "integration can never truly be said to be 'done' " (MacLaughlin, 2010). Moving forward, survey responses suggest BGCSCBC's leadership team should focus on four key areas:

- Integrating cultures & building teams
- Recognizing staff
- Personalizing communication
- Increasing program awareness

Findings revealed the key strategic challenge facing BGCSCBC leadership after the merger is cultivating employees in order to address 2013-2018 Strategic Plan objectives. Three options requiring increasing levels of commitment were presented in order for BGCSCBC leadership to tackle this challenge. Options were assessed against five criteria: staff engagement, staff reach, leadership support, time, and costs. Option 2 was recommended as it requires moderate funds and leadership support, yet facilitates moderate-high staff engagement and reach over the next year. Specific Option 2 strategies include monthly office hours with the CEO to personalize staff-leadership communication, a merger celebration event to recognize staff efforts, A Culture Club with increased capacity and resources to promote ongoing team building and cultural integration, and program awareness videos to showcase BGCSCBC's services to stakeholders.

Overall, BGCSCBC is in a strong position to wrap up loose ends and lead a stronger, integrated, high-impact organization. Implementing Option 2 will require notable financial and human

resource investments, and ongoing monitoring and evaluation on behalf of the leadership team. However, investing in human resources will enable BGCSCBC to cultivate employees as 'Champions of Kids.' By pursuing Option 2, BGCSCBC can move from a good to *great* place to be.

Although this report assessed staff satisfaction among current BGCSCBC's employees, 'temperature checks' will be required for BGCSCBC leadership to remain apprised of staff needs. Over the next year, BGCSCBC can gauge the impact of Option 2 strategies and develop a long-term plan to determine staff satisfaction during 2014.

This report presented mergers as a viable option for non-profit organizations interested in building sustainable high-impact organizations in light of pressing economic and social challenges. However, compared to the US, UK, and Australia, Canada exhibits limited research and support for non-profit organizations considering mergers. Additional case studies are required to showcase the process and potential benefits of non-profit mergers in a Canadian context.

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12. APPENDICES

Appendix 1: Types of Mergers

Merger Type	Industry	Services	Competition	Benefits	Example
Horizontal	Same	Similar	Yes	<ul style="list-style-type: none"> • Expand services • Broaden client base • Reduce service duplication 	The BCGGV & BGCCS
Vertical	Same	Different	No	<ul style="list-style-type: none"> • Provide a continuum of services • Promote consistency across service domains • Achieve administrative efficiencies 	Emergency Shelter & Supported Housing Facility
Conglomerate	Different	Different	No	<ul style="list-style-type: none"> • Reduce vulnerability to financial, service, and political changes • Achieve economies of scale 	A seniors organization & a youth organization
Concentric	Same	Different	No	<ul style="list-style-type: none"> • Create a one-stop-shop for service recipients • Promote consistency across service domains • Achieve economies of scale 	A daycare & women's health clinic

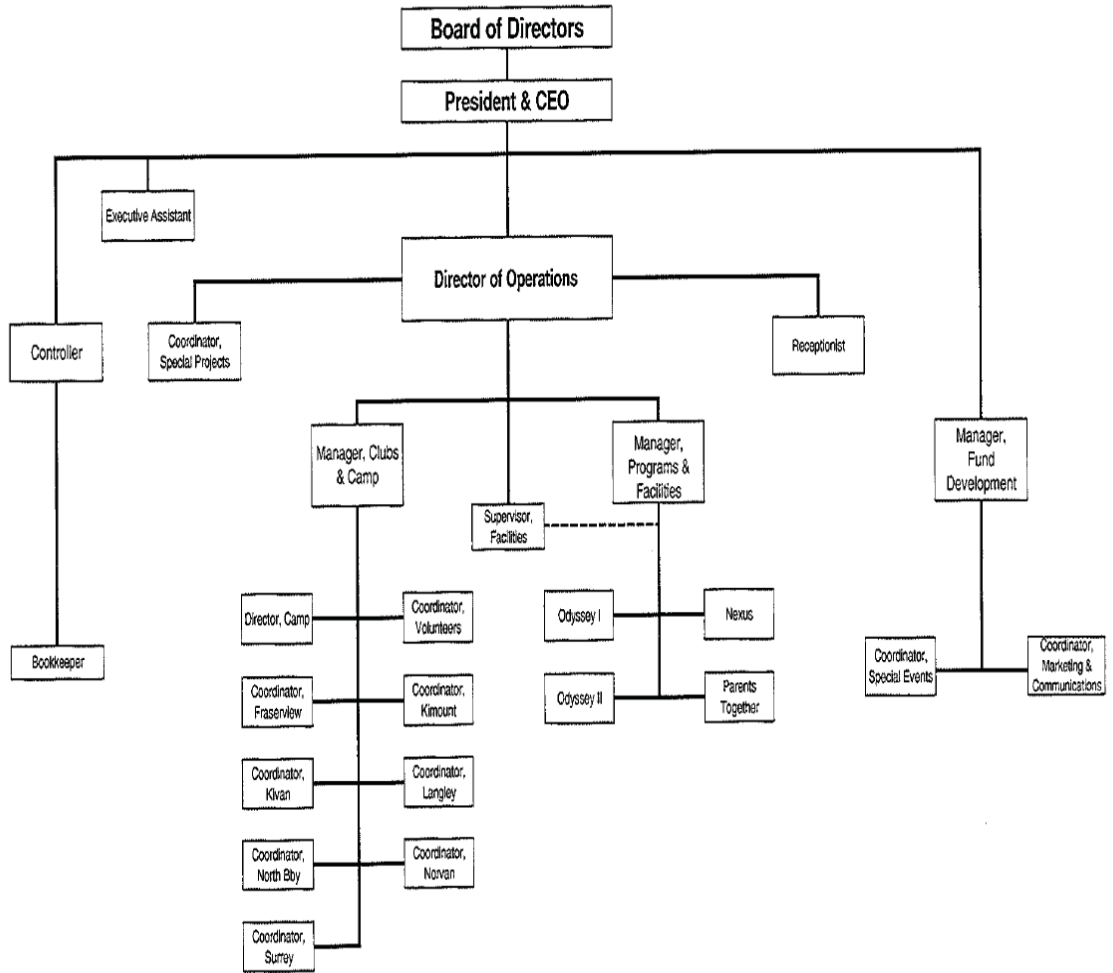
Arsenault, J. (1998). *Forging non-profit alliances*. San Francisco: Jossey Bass.

Appendix 2: Similarities and Differences Among Non-profit, Private, and Public Sector Mergers

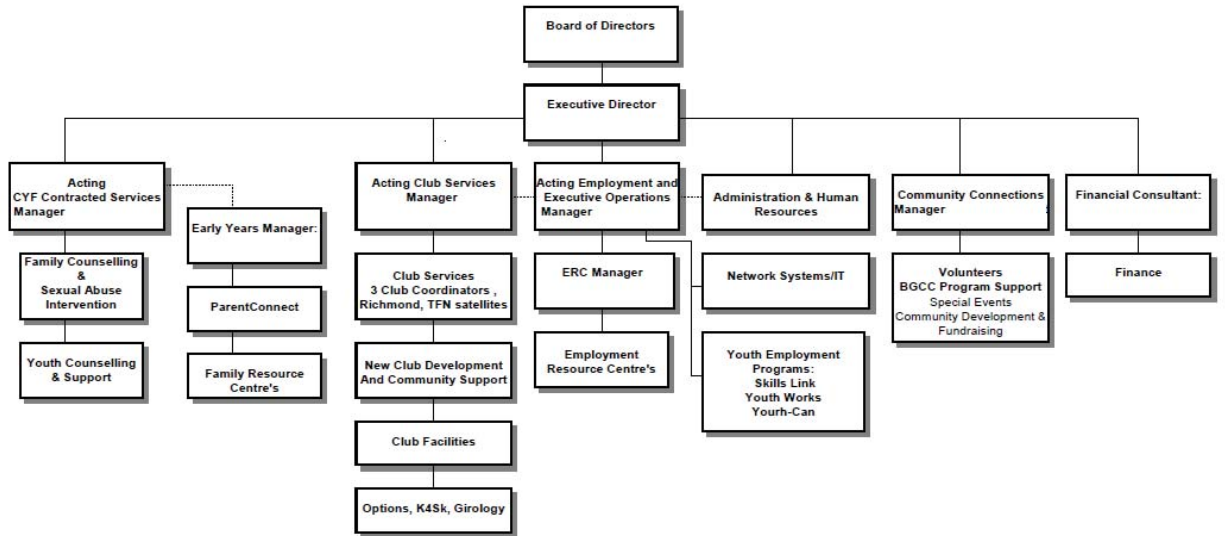
	Non-profit	Private	Public
Primary Drivers	<ul style="list-style-type: none"> • Responding to financial pressures • Enhancing service quality and impact 	<ul style="list-style-type: none"> • Increasing shareholder wealth • Achieving market dominance 	<ul style="list-style-type: none"> • Cost savings • Reducing service duplication
Goals	Social and Financial	Primarily Financial	Social and Financial
Dominant Theoretical Model	Process Model – Stages of Change	Process Model – Stages of Change	Process Model – Stages of Change
Success Factors	<ul style="list-style-type: none"> • Ongoing Communication • Strong Leadership • Effective Integration of management, facilities, and cultural systems • Effective human resource management 	<ul style="list-style-type: none"> • Ongoing Communication • Strong Leadership • Effective Integration of management, facilities, and cultural systems • Effective human resource management 	<ul style="list-style-type: none"> • Ongoing Communication • Strong Leadership • Effective Integration of management, facilities, and cultural systems • Effective human resource management
Potential Risks	<ul style="list-style-type: none"> • Loss of funders • Loss of donors • Loss of volunteers • Increased administrative costs • Decreased job satisfaction and organizational commitment from staff 	<ul style="list-style-type: none"> • Failure to achieve financial goals • Decreased job satisfaction and organizational commitment from staff 	<ul style="list-style-type: none"> • Mismanagement of public funds • Citizen distrust in public institutions • Decreased job satisfaction and organizational commitment from staff
Potential Benefits	<ul style="list-style-type: none"> • Achieve economies of scale • Reduce competition • Build capacity • Increase service quality and impact • Increase visibility • Increase fiscal resiliency • Attract and retain skilled employees 	<ul style="list-style-type: none"> • Achieve economies of scale • Reduce competition • Strengthen market position • Achieve financial goals • Attract and retain skilled employees 	<ul style="list-style-type: none"> • Achieve economies of scale • Taxpayer savings • Improve service coordination • Enhance citizens' perceptions of public institutions • Attract and retain skilled employees

Appendix 3: BCGGV Organizational Chart

Boys and Girls Clubs of Greater Vancouver
Organizational Chart



Appendix 4: BGCCS Organizational Chart



Appendix 5: Survey Participant Invitation Form

You are invited to participate in a study entitled “Creating ‘a good place to be’: A Case Study of The Boys and Girl Clubs of South Coast BC’s Merger” undertaken by Shawna Smith as part of the requirements for the Masters of Arts in Community Development (MACD) program at the University of Victoria.

The purpose of this research project is to gain an understanding of the change process in merged non-profit organizations. We are interested in learning about recent changes you have experienced, and your ideas on how to improve your workplace.

You are being asked to participate in this study because of your knowledge of the Boys and Girls Clubs of South Coast BC’s merger. If you agree to voluntarily participate in this research, your participation will include a survey completed online. The survey will take approximately 30-45 minutes to complete. I will summarize and transcribe survey results.

The potential benefits of your participation in this research include enhancing the BGCSCBC’s understanding of issues facing the organization after the 2011 merger. As a staff member, your input will influence the organization’s decisions to better meet staff needs over the next year. You will be able to view the final research results upon project completion. Research of this type is important because it provides students in the MACD program an opportunity to carry out a practical, applied project to develop research and advising skills. Graduating from the MACD program also requires completing a research project with a non-profit organization.

Participation in this study may cause some minor inconvenience to you in the time required to participate. However, the BGCSCBC CEO has agreed all surveys may be completed during paid working hours. There are no known or anticipated risks to you by participating in this research. Your participation in this research is completely voluntary. If you do decide to participate, you may withdraw at any time without any consequences or any explanation. If you do withdraw from the study your data will not be used in the study and will be destroyed.

To protect your anonymity, pseudonyms will be used in the final report. Only the researcher will have access to the survey data -- your confidentiality and the confidentiality of the data will be protected by storing all hard copies of survey responses in a locked drawer at the researcher’s home. Electronic information will be password protected at the researcher’s home office. Data collected from your survey will only be used for this study. Data from this study will be disposed of through shredding and the removal of electronic files after project completion.

The results of this study will be shared with Dr. Lindquist and BGCSCBC CEO Carolyn Tuckwell by means of a final report, which will also be available for public viewing on the University of Victoria’s D-Space Online Portal. However, all names will be replaced with pseudonyms so none of your responses will be traced to you.

Contacts: Individuals who may be contacted regarding this study include:

Shawna Smith (Researcher)	604-767-9116	svs_smith@hotmail.com
Dr. Evert Lindquist (Supervisor)	250-721-8084	evert@uvic.ca
Carolyn Tuckwell (Client)	604-879-6554	ctuckwell@bgc-bv.bc.ca

In addition, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Human Research Ethics Office at the University of Victoria (250-472-4545 or ethics@uvic.ca).

To participate in this study, please follow the Survey Monkey link below. If you submit this survey, it will be understood that you consented to participate. Please keep a copy of this email outlining the consent process for your records.

Appendix 6: Survey Participant Letter of Information for Implied Consent

Creating 'A Good Place To Be': A Case Study of The Boys and Girls Clubs of South Coast BC's Merger

You are invited to participate in a study entitled "Creating 'a good place to be': A Case Study of The Boys and Girl Clubs of South Coast BC's Merger" undertaken by Shawna Smith as part of the requirements for the Masters of Arts in Community Development (MACD) program at the University of Victoria.

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Shawna Smith (Researcher)	604-767-9116	svs_smith@hotmail.com
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The purpose of this research project is to gain an understanding of the change process in merged non-profit organizations. We are interested in learning about recent changes you have experienced, and your ideas on how to improve your workplace.

You are being asked to participate in this study because of your knowledge of the Boys and Girls Clubs of South Coast BC's merger. If you agree to voluntarily participate in this research, your participation will include a survey completed online. The survey will take approximately 30-45 minutes to complete. I will summarize and transcribe survey results.

The potential benefits of your participation in this research include enhancing the BGCSCBC's understanding of issues facing the organization after the 2011 merger. As a staff member, your input will influence the organization's decisions to better meet staff needs over the next year. You will be able to view the final research results upon project completion.

Research of this type is important because it provides students in the MACD program an opportunity to carry out a practical, applied project to develop research and advising skills. Graduating from the MACD program also requires completing a research project with a non-profit organization.

Participation in this study may cause some minor inconvenience to you in the time required to participate. However, the BGCSCBC CEO has agreed all surveys may be completed during paid working hours. There are no known or anticipated risks to you by participating in this research. Your participation in this research is completely voluntary. If you do decide to participate, you may withdraw at any time without any consequences or any explanation. If you do withdraw from the study your data will not be used in the study and will be destroyed.

To protect your anonymity, pseudonyms will be used in the final report. Only the researcher will have access to the survey data -- your confidentiality and the confidentiality of the data will be protected by storing all hard copies of survey responses in a locked drawer at the researcher's home. Electronic information will be password protected at the researcher's home office. Data collected from your survey

will only be used for this study. Data from this study will be disposed of through shredding and the removal of electronic files after my project has been completed.

The results of this study will be shared with Dr. Lindquist and BGCSCBC CEO Carolyn Tuckwell by means of a final report, which will also be available for public viewing on the University of Victoria's D-Space Online Portal. However, all names will be replaced with pseudonyms so none of your responses will be traced to you.

Your signature below indicates that you understand the above conditions of participation in this study, that you had the opportunity to have your questions answered by the researchers, and that you consent to participate in this research project.

<i>Name of Participant</i>	<i>Signature</i>	<i>Date</i>
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A copy of this consent will be left with you, and a copy will be taken by the researcher.

Appendix 7: Survey Questions

Introductory Questions

1. How did you become involved with the Boys and Girls Clubs?
2. How did you become involved with the Boys and Girls Clubs?
3. How long have you worked with the Boys and Girls Clubs?
 - Less than 1 year
 - 1-2 years
 - 3-5 years
 - 5-10 years
 - More than 10 years
4. The Boys and Girls Clubs of Greater Vancouver legally merged with the Boys and Girls Clubs Community Services of Delta/Richmond in April 2011 to form the Boys and Girls Clubs of South Coast BC. Which organization were you hired to work with?
5. What is your current position with the Boys and Girls Clubs? If your position has changed since you were hired, please use the 'other' box to describe previous positions.
 - Director/Manager
 - Coordinator
 - Program Staff (Programmer, Counselor, Facilitator, Case Manager, Job Developer)
 - Administrator
 - Activity Leader
6. Please select the option that best describes your current position.
 - Please select the option that best describes your current position. Full time
 - Part time
 - Casual

Stage 1: Merger Negotiation/Pre-merger Organizational Dynamics

7. What was it like to work with the Boys and Girls Clubs before the April 2011 merger? Please describe the organization's overall 'vibe.'
8. Overall, how satisfied were you with the way your organization was functioning before the merger? What was working well? What were the key challenges? Please give examples if you can.

9. Please explain how the merger was communicated to you. How did this make you feel? Do you think the communication process was handled well? What could have been handled better?

Stage 2: Merger Implementation

10. Please explain your involvement in the merger process. Were you happy with your level of involvement, or would you have liked to be more/less involved in the process?

11. Was the merger a 'non-event' or did the merger impact your work routine? Please give examples.

12. Describe any social or operational support you PROVIDED and/or RECEIVED during the merger process.

13. For Managers, and Directors: What do you think you handled well? What could you have handled better?

14. For Coordinators, Program Staff and all other employees: How did your supervisor/the leadership team manage the merger process? What did they handle well? What could senior leaders have handled better?

15. Overall, what parts of the merger process did not go well? Why do you think this was the case? Please give examples if you can.

Stage 3: Merger Integration

16. After the merger, have you noticed any positive outcomes for yourself, your colleagues, the organization, and/or individuals accessing BGC services?

17. On the other hand, has the merger produced any negative outcomes for yourself, your colleagues, the organization, and/or individuals accessing BGC services?

18. Organizational culture often refers to the way staff are recruited, trained and supported; how people in the organization communicate; how decisions are made; and how an organization celebrates success. Please describe any changes in the Boys and Girls Club culture during the merger process. Do you think Greater Vancouver's culture and Delta/Richmond's culture were well integrated? What could have been done to improve this process?

19. Overall, how satisfied are you with the way your organization is currently functioning? Please give examples if you can.

20. How satisfied do you think other staff members are with the way the organization is functioning?

Future Integration

21. Over the next year, what key areas do you think the BGC should focus on to ensure ongoing successful merger integration? Do you have any ideas on how these issues can be resolved?

Appendix 8: Merger Success Factors by Country, Sector, and Merger Stage

Researcher(s)	Research Location	Sector of Focus	Negotiation	Implementation	Integration
Taylor, Austin & Caputo (1992)	USA	Non-profit	<ul style="list-style-type: none"> • Prepare the staff and Board by openly sharing the plan • Define a shared mission • Anticipate future decisions 	<ul style="list-style-type: none"> • Communicate with staff • Integrate service delivery 	<ul style="list-style-type: none"> • Continue integrating service delivery • Celebrate successes • Develop new organizational 'family'
Jimmieson, Terry & Callan (2004)	Australia	Public	<ul style="list-style-type: none"> • Relay change information to staff 		
Dackert, Jackson, Olof & Johansen (2003)	Sweden	Public			<ul style="list-style-type: none"> • Support development of new organizational culture among staff • Uncover employees' expectations of the new organization
Kavanagh & Ashkanasy (2006)	Australia	Public	<ul style="list-style-type: none"> • Lead well • Embrace an incremental approach to change • Manage human factors 		
Davies & Rainville (2004)	Canada	Non-profit	<ul style="list-style-type: none"> • Communicate well • Establish trust • Devote time 		
Cowin & Moore (1996)	UK	Non-profit	<ul style="list-style-type: none"> • Establish a shared vision • Manage cultural differences • Foster trust and respect • Handle human factors sensitively 		
Cairns, Harris & Hutchison (2003)	UK	Non-profit	<ul style="list-style-type: none"> • Lead • Adapt and compromise • Manage cultures • Manage resources • Manage human factors • Communicate • Evaluate 		
Nguyen & Kleiner (2003)	USA	Private	<ul style="list-style-type: none"> • Employ hands-on leadership • Support a bias for action • Communicate intent to offer best value to customers • Involve all staff 		

			<ul style="list-style-type: none"> • Communication honestly with employees 	
Frumkin (2003)	USA	Public	<ul style="list-style-type: none"> • Communicate with stakeholders • Manage all organizational cultures • Minimize negative impact on staff • Garner stakeholder support • Ensure time for effective planning • Develop a clear mission and goals 	
Kohm, La Piana & Gowdy (2000)	USA	Non-profit	<ul style="list-style-type: none"> • Ensure a positive history of partnerships • Achieve Board support • Develop positive Board/executive relations • Promote an organizational growth orientation 	
Yankey et al. (2001)	USA	Non-profit	<ul style="list-style-type: none"> • Develop a shared vision and mission • Lead well • Ensure adequate financial support • Integrate cultures • Communicate honestly • Involve stakeholders • Value trust • Recognize risk • Take time for planning • Don't make assumptions • Use consultant/facilitator 	
Pietroburgo & Wernet (2008)	USA	Non-profit	<ul style="list-style-type: none"> • Communicate • Lead • Retain organizational cultures • Build social capital • Ensure enough time 	
Key Themes	Negotiation <ul style="list-style-type: none"> • Merger Drivers • Organizational Compatibility • Organizational Resource Bases • Leadership • Initial Communication 		Implementation <ul style="list-style-type: none"> • Leadership • Communication • Staff Involvement • Staff Morale • Organizational Culture 	Integration <ul style="list-style-type: none"> • Leadership • Communication • Staff Satisfaction • Organizational Culture • Organizational Identity

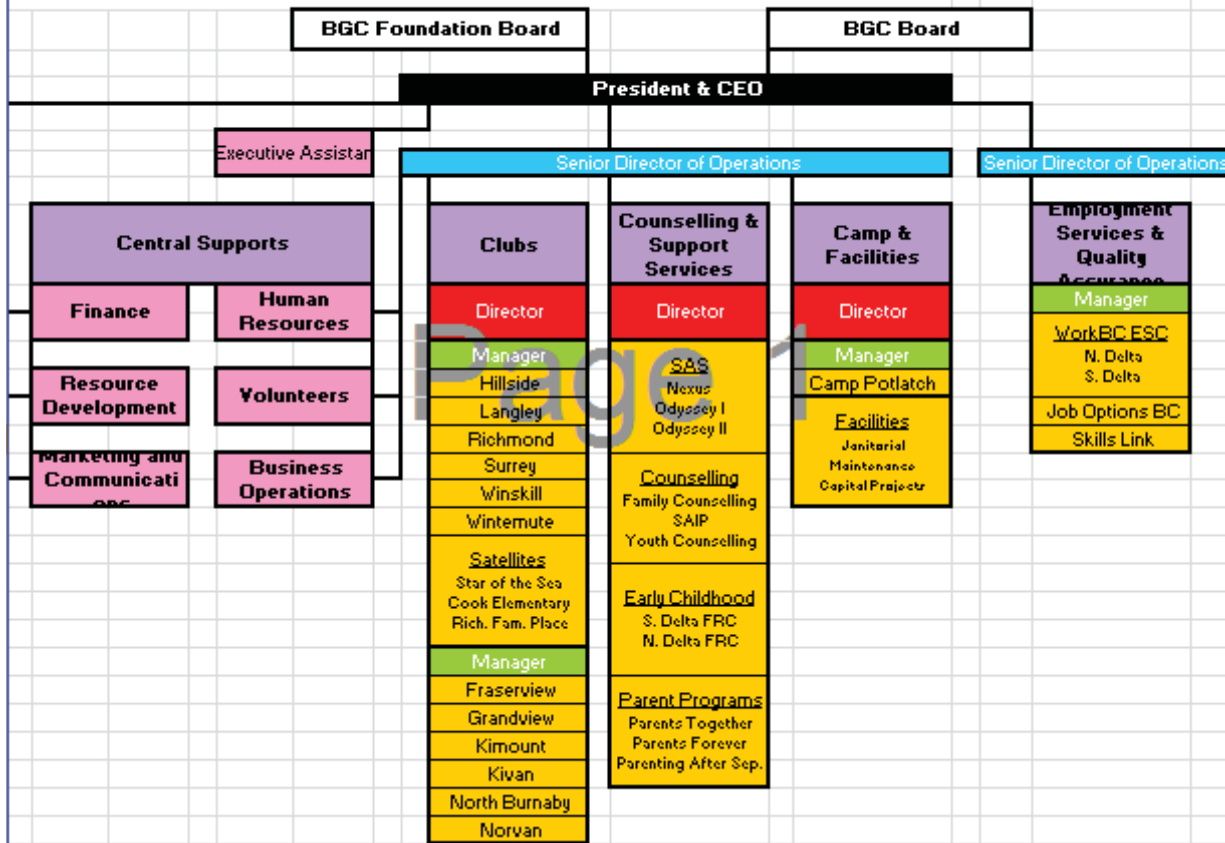
Appendix 9: SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Club Services are solid and strong • Strong profile within Delta community • Delta community ownership • Growth in Richmond (rapid) • Diversity of programs • Lean service models • Diverse funding models • BGCCS “Community” Board • BGCGV “Profile” Board • Committed/talented staff • Fundraising (BGCGV) • Gov’t Contracts (BGCCS) • Neighbourhood presence • Leadership • Historical respect between orgs. • Strong Brand Recognition • Growth into Surrey 	<ul style="list-style-type: none"> • Competing with each other • Lower profile (both) than is ideal • Lack of growth into Richmond • Dilution of Core Service Focus • Limited Infrastructures • Risk factors in both models • Limited fundraising cap/network • Diversity/Comm. Representation • Reliance on Fundraising for op’s • Reliance of Gov’t Contracts for op’s • Limited access from other neighbourhoods • Not “deep” enough • Different Community profile between orgs. • Brand limits perceived focus of org’s
Opportunities	Threats
<ul style="list-style-type: none"> • Bigger, stronger brand and voice • Increased internal shared resources • Recruitment and retention • Leveraging intellectual capacity internally to trigger/facilitate service growth/reach more children/youth/families • “The best of....” • Increased range of service options • More nimble in community development • Decreased competition related growth barriers • Proactive/Progressive focused organization • New relationships leveraged from existing ones • Opportunities for expanded earned media • Ability to respond to emerging needs • Increasing complexity of our services makes us uniquely able to be the “go to” org 	<ul style="list-style-type: none"> • Government pressures/cuts/changes (i.e. efficiencies of scale within) • Fundraising challenges • Gaming funding (broadly and specifically) • YMCA’s Focus on leading after school programs • Perception of merged organization • Potential loss of community focused support (donors & volunteers)

Appendix 10: BGCSBC Organizational Chart



Boys & Girls Clubs
of South Coast BC
A good place to be



Appendix 11: Staff Recommendations for BGCSCBC's Organizational Development

Integrating Cultures & Building Teams

"Continue bringing All the Staff together."

"Continue to do what we have been doing-staff team building including a counselling stream team build. Culture Club to continue to organize social opportunities for people to come together."

"Making sure Clubs merge in a way that makes them the same across the board but also allows for each of them to become their own entity."

"I think the BGC should continue to focus on having events that build organizational culture. This provides more opportunity for the organization to feel as one."

"More inter-program integration."

Enhancing Human Resources Systems

"Appreciation for all employees, support, compensation increase, fairness, supervision of managers/supervisors, consistency within all clubs."

"Continue to honor the creativity of individuals, separate groups, and the grassroots nature of what we do - continue to engage people along with "business units" and you'll do great."

"I think that the key areas for an ongoing successful merger is still to keep the staff informed of changes and direction that the board & CEO would like to take the agency. By continuing using the strategic plan for changes, funding, programs, and direction. As an agency team, we need to make the changes to make the agency grow and be strong. As far as I am concerned being on the admin team that we should meet as a team and make changes to fit each person as we grow."

"To create a more balanced pay scale across similar programs. My team is paid significantly less than those doing a similar job on the Vancouver side. This is in some ways due to the different government contracts we operate under, but I feel the agency should be more proactive in creating an equal pay structure."

"Competitive wages for employees so that good people stay with the bgc."

"Better treatment of staff."

"Due to a wider range of services I feel that attention to adequate managerial staffing in order to maintain effective service with as little staff burnout as possible is important."

Integrating Administrative Systems, Policies and Procedures

"I believe we should concentrate on infrastructure - as much as possible completing policies and procedures and implementing and establishing systems to carry these out. With this comes the concentrated effort to re-orient all staff on new systems and procedures, and support them in changes."

"Completing policy procedure. Ensuring there is less confusion. Speed up processes (simplify steps, speedier response."

"I think one of the main things we need to get on top of is finalizing all of our new procedures, processes, policies etc. and the related forms etc. that go with them. These things are all in process and take time but it will be good when we are all working from one instruction manual "so to speak" and [know] where to find information when we need it."

"Work on any issues with the Corporation of Delta"

Increasing Awareness of Programs & Services

"Presence in the community. Continuing the excellent programming that the BGC runs is key."

"Focus on promoting programs and advertising so the public is aware of all that the BGC does, including clubs, counselling, early years etc."

"BGC needs to continually work on our online identity to make it more simple for our clients. Our clients need to better understand our agency as a whole."

"Focus on cross job awareness"

"Work on the perception that government funded programs are a second cousin to clubs and camp."

Focusing on Family Resources

"Offering up more resources to families through the coordinator."

"Promoting Families and their children whether it is in counselling or Family Resource Centres."

Overall Satisfaction

"Just keep doing what they are doing as I feel it is going well." "Not sure about this, seems good to me."

Unsure

"I do not know." "If the merger was a non-event there shouldn't be a need to address long-term merger integration. We're now the BGC of South Coast. So anything that happens now will be under a new organization."

Appendix 12: Comparing Recommendations within Options

Success Factor	Option 1: Creating a good place to be	Option 2: Creating a great place to be	Option 3: Creating the place to be
Communication		<p><i>Office hours</i></p> <p>Engagement: High Potential Reach: Moderate Leadership Support: Moderate Costs: Low Timeline: Ongoing Approximate Annual Cost: \$0 CEO arrange schedule to accommodate drop-ins</p>	<p><i>Online platform</i></p> <p>Engagement: Moderate Potential Reach: High Leadership Support: Moderate Costs: Moderate Timeline: Ongoing Approximate Annual Cost: \$2,200 IT Platform = \$100/month x 12 months = \$1,200 1 Technician x 10 hours/month x 2 months x \$50/hour = \$1,000</p>
Culture	<p><i>Continue the Culture Club</i></p> <p>Engagement: Moderate Potential Reach: High Leadership Support: Low Costs: Low Timeline: Ongoing Approximate Annual Cost: No cost increase</p>	<p><i>Build Culture Club</i></p> <p>Engagement: High Potential Reach: High Leadership Support: Moderate Costs: High Timeline: Ongoing Approximate Annual Cost: \$6,000 6 events/year x 200 guests x \$5/guest</p>	<p><i>Annual staff retreats</i></p> <p>Engagement: High Potential Reach: High Leadership Support: High Costs: High Timeline: Annual Approximate Annual Cost: \$9,000 3 meals/day x 2 days x \$5/meal x 200 guests = \$6,000 Transportation = \$10/person x 200 = \$2,000 Maintenance = \$500, Facilitator = \$500</p>
Identity	<p><i>New website</i></p> <p>Engagement: Low Potential Reach: High Leadership Support: Low Costs: Low Timeline: Short-term Approximate Cost = \$6,000, yet less than \$1,000 remaining (per Implementation Plan)</p>	<p><i>Program awareness videos</i></p> <p>Engagement: Moderate Potential Reach: High Leadership Support: Moderate Costs: Low, videographer in-kind Timeline: Short-term Approximate Cost: \$1,000 \$500 equipment, \$500 honorarium Staff Time: \$2,982.24 1 staff member/site (19) x 2 hours/week x 4 weeks x 2013 Living Wage (\$19.62) = \$2511.36</p>	<p><i>“Take a Peer to Work Day”</i></p> <p>Engagement: High Potential Reach: High Leadership Support: Moderate Costs: Low Timeline: Annual Approximate Annual Cost: \$0 Staff Time: \$7,848 2 days/year x 200 staff x 2013 Living Wage (\$19.62)</p>
Staff Satisfaction	<p><i>Embellished holiday party</i></p> <p>Engagement: Moderate Potential Reach: High Leadership Support: Low Costs: Moderate Timeline: Single Event Approximate Cost = \$1,000 1 event x 200 staff x \$5/staff</p>	<p><i>Merger recognition event</i></p> <p>Engagement: High Potential Reach: High Leadership Support: Moderate Costs: Moderate Timeline: Single Event Approximate Cost: \$2,000 1 event x 300 staff x \$10/staff</p>	<p><i>Annual staff awards</i></p> <p>Engagement: High Potential Reach: Low Leadership Support: Moderate Costs: Moderate Timeline: Annual Approximate Annual Cost: \$1,900 1 staff/site (19) x \$100/staff</p>

