



NON-PROFIT MERGERS



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The Charity Commission encourages trustees to consider whether a formal merger would be in the best interests of a charity's beneficiaries. Danny Davis, a specialist in mergers and integrating organisations after mergers shares some of the things that experience has taught him to think about in any merger situation.

- Be clear about why the organisations are merging – what are the benefits going to be?
- Don't just understand the similarities which make the organisations good candidates for a merger – recognise the major differences that will exist too.
- Planning is vital to a successful merger and integration of the two organisations – begin planning as soon as possible.
- Think about how the back office functions, such as finance, IT, human resources and communications might need to change as a result of the merger.
- Is the technology used by the two organisations compatible?
- Something unexpected will always come up. Try to be as ready as possible to address it quickly.
- Cultural differences will exist, which can cause problems. It helps to try to foresee these as much as possible.
- You don't have to do everything at once – think about having stages in the process of integrating the organisations.

Author

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Danny is an M&A integration specialist. With recent deals ranging from the pre-deal integration planning on a 50,000 person company purchasing a 25,000 person company, a \$6bn global deal where he ran the European side across 30 countries, 250 business units, 26 functions through to a small private equity set of deals.

He is a guest speaker at London Business School, has been published prolifically in business journals and wrote the book “M&A Integration: How to do it”

The Charity Commission also provides resources on collaboration and mergers, available at
<http://www.charitycommission.gov.uk/enhancingcharities/cwmresources.asp>



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