Managing the Merger of Two Nonprofit Human Service Agencies*

Bob Rybicki, Former Executive Director
Youth & Family Enrichment Services (YFES)
&
Michael J. Austin, Mack Professor of Nonprofit Management
School of Social Welfare, University of California, Berkeley

Introduction

The original name of the agency that I was hired as Executive Director to lead in 2002 was Youth and Family Assistance. It was founded in the early 1980s by Rich Gordon (now a member of the County Board of Supervisors) and had its origins as a program component of the local YMCA. When Rich discovered that the YMCA didn’t hire him as their Executive Director because he was gay, he filed a lawsuit. The YMCA avoided a court hearing by letting him take the program and form a new nonprofit. So when I arrived, Rich had been gone for five years and there had been two interim Executive Directors and my immediate predecessor got caught up in the economic downturn, following the September 11 (2001) tragedy in New York and Washington DC, in which the agency had basically exhausted its reserves and had run up a debt of $250,000 on a line of credit with a local bank and had only $70,000 sitting in reserves. During my second month on the job, the bankers called for the loan to be repaid indicating that there had been no repayments for well over a year and wanted to know my repayment plan. So I found the agency close to bankruptcy even though we owned a piece of land with the county but the proceeds from selling it would not help us very much. The annual YFA budget was about $3.1 million and it had an administrative staff of 9 program directors, some with only one person reporting to them.

* All reference to “I” in this case study is the voice of the senior author.
In essence, they had been promoted to their highest level of incompetence. So I began trimming the budget by about $300,000 to $400,000 and started laying off staff. Many of these program directors could not understand the need for all this and asked if I would restore their budgets after the cuts. The reality was not sinking in. It was the beginning of a “perfect storm.”

In addition to the agency being fiscally in bad shape, the Board Chair had fired the Development Director before I arrived, presumably to help me resolving a personnel problem and avoid spending time on another layoff. However, this action triggered the exodus of the entire development staff and the only one left when I arrived was a part-time development staff person who was in the process of leaving for another job. So here I was as a brand new Executive Director in an agency that was fiscally broke with no development department and a CFO who announced in my first month that she was moving back to New Zealand. So I wondered if there would be anybody there to turn off the lights at the end of the day besides myself. So that was sort of the condition of the organization in my first few months on the job.

So it was timely that during my first month I found the merger binder that contained all the discussions between Youth and Family Assistance YFA and Family and Community Enrichment Services (FACES). It turns out that YFA and FACES had been in some dialogue about six months before I had been interviewed for the position when the folks from FACES got scared by looking at YFA’s financials and backed away. At the same time, the Executive Director of FACES was about to go on a sabbatical. So it was not seen as a good time to enter into any kind of a relationship. So when I came on board in July and read the manual, it became clear to me that this merger should happen, especially in the light of the State of California budget shortfall of $30 some billion dollars. In addition, I concluded that two-thirds of the program directors should not be in those positions, especially since I did not have the quality staff that I
needed given that many of the line staff were not licensed. So, when I looked at the merger documents, I saw “pots of gold” because FACES had reserves and good cash flow as well as competent staff who could provide good supervision for BSWs and MSWs entering the agency.

Pre-merger

FACES was the same size as YFA and almost the same amount of staff (approximately $3.1 million and about 60 staff). YFA had different programs and the only program overlap related to juvenile justice diversion services. So I decided to meet with the interim FACES Executive Director, Pete Nannarone to explore any interest in revisiting the merger idea. I had the merger binder that reflected current financials, cash flow projections, current contracts, organizational charts, service program descriptions, board governance issues, bylaws, articles of incorporation, and correspondence going back and forth and I concluded from my review that the merger discussion should be reinstituted. Pete agreed wholeheartedly. My YFA board chair did not trust the FACES board chair but I got along with him and he eventually became the board chair of the merged organization.

So while I waited to talk with Pete, I had a staff retreat to discuss YFA reorganization (moving from nine departments to four), developed a new vision and values statement, an implementation plan and a development plan that I used in my first discussion with Pete to demonstrate that we were a viable partner for a future merger. The YFA board had done some self-assessing related to strategic planning in nonprofits. It basically poses four questions: 1) Is this program consistent with the mission of the organization? 2) Is anybody else doing it? 3) How well are you doing it? And 4) How well is your competition doing it? The response grid for these questions range from: “Stay with the program and strengthen it” or “Give it away” or “Merge it with something else”. I used this analysis to reorganize the agency.
In the meantime, I learned that despite FACE’s financial and staff strengths, a recently funded evaluation by the Schwab Foundation found poor executive leadership and low staff morale. So Pete had that report in the back of his mind when we met in September. Given our shared interest in moving forward with an exploration of merger, we agreed to meet again with our two Board chairs (and the YFA incoming chair) the next month at a neutral site that turned out to be a cold, dark, rainy night. We wanted to make sure that nobody would see us meeting under the cover of darkness. So my board chair was there. The five of us basically went through all the reasons that merger negotiations should start again. I think we answered a lot of the previous objections and both board chairs became more comfortable and trusting of each other. We agreed that after doing a preliminary assessment of up-to-date financials from each organization, that we would begin discussions with both boards to see if they would want to give “a green light” to start the negotiations again.

The boards met separately off site and I was there for both board meetings to make a presentation and to answer questions. I introduced two caveats to the negotiation process; namely, we need to proceed with all seriousness because the staff will not tolerate another failed attempt and secondly, if we want this to happen, it needs to occur by June 30th (approximately six months away) because most of our contracts are renewed on July 1. Both board unanimously agreed to move forward. My sense was that the FACES board members were tired (many had been on the board for 10-15 years), had an interim director who was not interested in directing the merged organization, and were attracted to the idea of a larger organization. The YFA Board was also eager to move in the merger direction and saw it as a great opportunity. I think that both groups saw the potential for higher visibility for the merged organization that would also be impressive to the County service funders (I had been encouraged by the County Human Services
director to consolidate, given the proliferation of nonprofits). We then proceeded to schedule committee meetings in December to develop timelines and tasks as well as update each other's staff on what was going to happen. I also recommended that we bring in a merger consultant to help us think through the steps. The organization charts of both organizations are located in Attachments A and B.

I was very clear with my board and with their board in the very beginning that this merger should happen, whether or not I was the executive director, because it made sense for the nonprofits of San Mateo County and for the adults and children that we both serve. So when I met in January with the FACES board, they basically were interviewing me for the Executive Director position but I didn't realize it at the time as I was focused on the merger process itself. The YFA board indicated that they would not support the merger if I was not going to be the Executive Director of the merged organization. I was then surprised to learn that both Boards on their own had decided that they wanted me to be the ED of the new organization and both agreed to bring on the merger consultant. So in January, the staff members of both agencies kind of knew that I would most likely be the new ED.

There was an interesting difference in the cultures of the two organizations. When I met with the FACES staff in their conference room in rows of chairs like a classroom, I was formally questioned by staff who held Ph.D.s in psychology and MSWs and MFCCs. In contrast, the YFA staff sat informally in a circle in a large room with some staff sitting on the floor. This difference in culture would play out in the formation of joint merger planning committees. In these meetings, I laid out the various committees and indicated that we would start the planning process by bringing together the senior management of both organizations, approximately 20 that represented all the programs to be divided into teams with representatives of both organizations.
on each team. Their first task as teams was to fully inform each other about their respective
service programs in each organization and begin to develop a new organization chart that would
reflect the integration of all the programs. As a result, different teams came up with different
organization charts that laid the groundwork of senior staff working together for the first time.
The goal was to start working together as members of teams in order to develop the level of
communication and trust needed for a successful merger. The role of the merger consultant was
to facilitate the meetings of all the teams.

In addition to the normal jockeying for position in the newly merged organization, the
biggest challenge was overcoming the cynicism of staff since they had engaged in similar
discussions in the past that did not result in any change. The other push-back from staff was their
concern about the amount of time devoted to meetings when they saw their jobs as serving
clients and not attending meetings. With the completion of the work of the planning teams, the
consultant encouraged us to bring everyone together to remind staff that all their hard work was
actually leading to a redefinition of their jobs in the newly merged organization. Here is where
we introduced the new vision and mission statements that I had built with the extensive input of
line staff. The staff members in both agencies were aware of the work of the Mission & Vision
Committee because we brought both staffs together every month throughout the six month
merger planning process to provide progress reports. At one of those meetings four potential
mission statements and three potential vision statements were presented followed by discussions
of which one was preferred over the others. They voted on the statements that they liked the most
and we took them to both Boards for further discussion. After trying unsuccessfully to
“wordsmith” these statements, both Boards agreed that they were good enough to proceed (See
Attachment C and D for the Mission and Values Statements).
So the Human Resource committee, different from the Program committee, was the largest (25 members representing both agencies and a Board member with HR expertise) and focused on merging organizational cultures and processes. What came out of the early meetings were hurtful stereotypes of each other (e.g. “Because you don't have college degrees or you're not an MSW, you're not doing good work.”). The YFA staff was both informal and less professionally trained while FACeS staff was more formal and highly trained. YFA staff members were more laid-back while FACeS staff appeared more rigid and authoritarian. So you had those polar opposites in the same room and we finally decided to list all the stereotypes on the blackboard, even if they were painful to hear so that they could talk about them openly. It broke the ice so that they could educate each other. Then the focus shifted to concerns about the new Executive Director; namely, Who is he and what is he like? What can we expect from him? What is his leadership style?

I tried to help staff see that an open discussion of these issues was important in order to reinforce the notion that this was going to be a merger of equals and not an acquisition of the weak by the strong. I repeatedly stated that we need to take the best from both organizations in order to create a new culture together, and not impose one culture on the other.” So that helped them to identify things in each other's cultures that they wanted to keep to be reflected in a new HR manual. That committee did clever things like doing little skits in front of the entire staff to report on the progress of the committee as well as use humor to describe what occurred in their committee meetings. This committee handled some of our most complex culture issues and I kept the committee going during the post-merger integration as a way for me to have continuing access to line staff who were extremely candid. So I didn't have to worry about not ever hearing something from my managers because I was able to hear unfiltered concerns directly from line
While staff committees were meeting, the board also met monthly in a joint Board Merger Committee composed of three board members from each agency. I was able to obtain pro-bono counsel from a major law firm which assigned four attorneys to the project. I was on all of these committees and therefore hearing all progress reports firsthand.

Once both Boards made the decision that I should be the new ED for the merged organization, I started to attend board meetings for FACES on a regular basis. So I had double duty every month, attending both board meetings, and listening to stuff going on back and forth. It allowed me to establish a working relationship with both boards and also established good communication on both sides, and Pete also attended both meetings. In the consolidation of the two boards from 19 YFA board members and 7 FACES board members, a compromise was reached at 7 from each agency for a total of 14. The 7 that transferred from YFA had many years of experience on the Board and knew the staff very well.

In the merger planning process we had some IT issues that weren't easily solved. We were using an access database that FACES had designed but it really wasn't designed to accommodate a larger organization and we didn't have technologically sophisticated IT people in either organization. So we made do and were still wobbling three to four years into my tenure as ED.

The new administrative structure of three program directors included: substance abuse, clinical services, residential and youth development programs. We had to hire three new directors (one was an internal candidate). Our first step was to get the right people in place. The second step was to get the financials in order for a new financial accounting system starting July 1 as well as prepare the government contracts. We also put together our development plan and launched it by writing grant proposals. YFA finished the year off with a surplus of about $250,000 in the bank.
So we were financially very stable at that point but we were getting turned down by foundations who wanted to see if the merger would survive before funding us. It seemed ironic that we were being turned down by the same people who were supporting the merger. Our revenue stream consisted of approximately 10 to 15% fees, about 10% fundraising and foundation support, and 75% government contracts. We actually saved money in the merger. We went from a combined budget of $6.2 million ($3.1 million from each agency) down to $5.6 million based on a $500,000 savings related to reduced administrative positions, rent, and insurance.

A new organizational culture began to emerge as we relocated staff. YFA staff moved into a FACES culture that had been all female for years and years since their founding and now had men from YFA integrating the senior ranks. You could have cut the tension with a knife for the first few weeks (e.g. “When you go to the bathroom, make sure you put the toilet seat back down when you leave” to “When you're in the kitchen, make sure that you put the coffee pot back this way.” to “Don't put your radio on when you're in the office, because we don't allow radios to be played in the offices here.”) All those informal rules or cultural norms had developed over time at FACES and the YFA had no idea what they were.

The biggest challenge in merging the two cultures was the fact that people didn't know each other, even though they had come to all of these meetings. So they tended to sit kind of in their own agency clusters and the only place that we actually could meet as a group of 100 people was in the FACES conference room. Throughout the first couple of months I would hear comments like: “Well, we used to do it this way at FACES” or “We used to do it that way at YFA.” It was not until the end of the first year that I would hear staff members use our new agency name (Youth and Family Enrichment Services).

The only place that both boards got bogged down was the choice of the new agency name
and it took nearly a month to reach a compromise. When it came to the name, folks said, “Well, let's just call it Youth and Family something,” and they go, “Well, that sounds like Youth and Family Assistance.” “Well, we can't go that way. That sounds too much like FACES.” So they settled on selecting the first two letters from each agency (YF for YFA and ES from FACES) to create Youth and Family Enrichment Services. Today you don't hear anybody talking about YFA or FACES, however it took a while for the name of YFES to permeate the culture of the new organization.

The Merger

To launch the merged organization, we brought folks with a huge social barbecue to celebrate where members of the new board served the staff. By bringing everybody together, we were able to break the ice for those who did not know each other. We continued using our joint merger committees during the post-merger integration period in addition to team-building exercises to help integrate the staff from the former agencies (see Appendix E for organization chart of merged organization). We were still engaged in this type of team-building four years into the merged organization because we had 160 staff and many were new to the merged organization. The staff wanted each staff meeting to include some form of ice breaker in order for folks to get to know each other better.

As we hired new senior staff and shifted former senior staff to new positions or helped them leave the agency, the rest of the staff was watching and keeping score (2 former YFA staff members gone, 1 former FACES staff member gone = FACES are ahead). Some of this calculating and jockeying dissipated after a few months because the agency was spread out across the county but the impact clearly rippled throughout the merged organization. Some folks decided to leave or take new positions. We also actually promoted some folks who were interns.
because they became licensed or got their degree. But I think if you went back to the existing nine directors of YFA back in 2002 and asked them what happened, I'm sure they would see it was a takeover by FACES. As you look at the situation six years later, the former FACES staff members are generally older and more experienced staff but there are also former YFA staff in key positions. The newly merged staff members work in four major program areas: substance abuse, mental health, domestic violence, and family counseling. The first three areas were heavily supported by county contracts. Youth development was integrated into all program areas.

The organization chart of the merged organization is located in Attachment E.

Post-merger

Six months into the post-merger period, we continued to operate with our merger planning committees related to Program (looking at best practices), Marketing, Branding,, IT, Reporting Systems. From the Program perspective, we didn’t want silos where departments don't talk to each other, because clients are shared across programs. We focused on service integration across all 20 programs within the departments. Service integration became critical for us so that clients could easily navigate our complex system of services.

The merger brought accountability for the former YFA in relationship to contract compliance, deliverables, and quality assurance. So I think that the financial and program accountability was one of the themes of the newly merged organization but the change hit the YFA staff more dramatically because the FACES staff were already familiar with this level of accountability. With the programs located at different sites, I purposely made quarterly trips to each of the sites to talk to the staff in each program in their staff meetings to answer questions and get feedback. This approach was new and they weren't used to having an ongoing HR committee where members of line staff would be meeting informally with the executive director.
to talk about issues and merger implementation concerns. Team building became part of the new participatory culture where staff could see their role in establishing and monitoring the values of the new organization. My message was: “I'd like your feedback on this. What do you want to do? And I'll report back to you on what I did with your feedback.” I would take their ideas and return with either a yes or no by explaining my reasons but also encourage the development of alternatives to promote change and follow-through.

I also made mistakes that were important to acknowledge. For example, YFA had an informal policy allowing for telecommuting but FACES did not allow telecommuting at all. I was in favor of telecommuting because I was only thinking of administrative staff like those in fund development where I didn't see a need for my grant writers to sit in a nearby office when they could be working more effectively at home. However, it was also clear that counselors who see clients couldn't telecommute. When seeking advice from my senior program directors, I made the mistake of not saying to them that if we did not reach consensus on this issue, I would make the final decision. I just let them give feedback and they presumed they were making the decision. It then came to a boiling point with 3 senior staff in favor and 3 against. So I decided to allow telecommuting but incorporated the objections of folks who were opposed to it by creating a procedure whereby all telecommute decisions would be brought to the management group to make a decision and monitor its impact.

We had five program directors and 19 program managers. Frequently I would bring these 25 folks together to make sure we're all on the same page. For example, we shared the new telecommute policy with the group of 25 to get their feedback. Another example was sharing the new values statement for the merged organization as part of the new employee evaluation system. After sharing it with the group of 25, it was then taken to staff for feedback. Then we
went out to the entire staff for feedback by dividing the 100+ staff into small work groups of 7-8 to report back with suggestions. The goal was transparency in decision-making with continuous efforts to seek feedback. I often asked my program directors to exclude themselves from the small group discussions in order to promote more staffs sharing and comfort. Instead, I had them meeting in their own group. We also used an anonymous employee feedback tool that included 24 questions related to teamwork, morale, consistency in service delivery, the impact of quality service, and feedback provided by managers. I would then present the aggregate findings to the entire staff at a major staff meeting and ask participants to breakout into small groups to discuss the findings and make recommendations that could be used to reach consensus on the next steps. We eventually got them to be specific so that we could isolate the issues by program areas seek more specific feedback from supervisors. An example of the feedback tool is located in Attachment F.

It was about a year after the merger was completed that we launched a modified strategic planning process after the dust of the merger had settled. We used the SWOT (strengths, weaknesses, opportunities, strengths) analysis technique to develop a three year plan with the use of an outside consultant.

Later in my quarterly visits to staff I began to use the SWOT approach in dialogue with staff and compiled the feedback into one report to share at an all-staff meeting. For example the eight page single-spaced summary included all staff comments (unduplicated) about the strengths of the organization and various programs. When it cam to threats and opportunities, I focused on the organization as a whole and not the specific programs. They could see their own words in print. Based on the findings, I would make a series of recommendations related to future organizational goals and objectives for the staff and board to address over the coming year. In
contrast, I would share the program level goals and objectives privately with each program
director and encourage them to do the same with their program managers. Then a year later I
would involve the staff in developing a report card on how well the various goals and objectives
were achieved so that we could generate comments for future discussion. The report card was
shared with both staff and board members. It also included goals and objectives for me as ED for
the coming year and I was evaluated by the Board based on the results.

The Board review of my performance included the results of the anonymous surveys
along with financial data and interview conducted by the HR directors of a cross-section of about
20 staff members. For the first year of the merged organization, the Board chair came from the
organization (FACES) that the ED did not come and the next year the Board chair came from the
old YFA board. For the third year, they agreed to groom someone who had come onto the board
with no prior affiliations and this process worked well. The six board members who were on the
initial merger planning committee stayed on the board and their bonding helped with all the
transition issues.

The representatives from county government were very pleased with the merger and were
eager to contract with us based on the efficiency and effectiveness of our staff expertise. In a
similar way, the Peninsula Community Foundation was also pleased with the merger and
increased some of our funding. Four years into the post-merger phase, our annual budget had
grown to $10.8 million supporting 165 staff. There were many new faces on the staff, including
part-time and intern staff. The exit of former staff members and the arrival of new staff brought
new energy to the merged organization as well as new collaborating agencies in the community.

Lessons Learned

Reflecting back on my five years at YFA and then YFES, I recall being very depressed
during the first few months with what was happening at YFA and how the merger required so much attention. By taking it one day at a time, I was able to learn more about my managerial style, especially the joy I get from doing something creative and challenging. Once the train left the station, I kept moving because I was driving it and found it to be very engaging and exciting. The most exciting part was guiding 160 people and 12 different sites by carefully listening to their concerns and not just to my program directors who tend to filter out those concerns. So one of the major lessons learned is to talk to everybody in the organization, especially line staff who can be very candid. Collecting anonymous staff perceptions in the annual survey also guaranteed that staff concerns would not be filtered out. I learned the most from going to staff meetings. Going out and mingling with the staff is really important and no conversation is insignificant.

In the beginning I was called upon to lead the merger process and then became more of a manager as the process unfolded and I tried to ride herd on 8-9 committees (staff and board) to make sure that they were all moving and doing their jobs in the context of developing a new organizational culture. It took a lot of detail-focused attention to stay on top of this complex process. I am very open to feedback as I try to learn from staff and board members as well as from my mentors over the years.

My approach to management goes back to my childhood in a poor Chicago neighborhood near the steel mills that was multi-ethnic and included African Americans, Mexicans, Puerto Ricans, Poles and the Irish all living in the same block. I learned that every person has a story and a voice that needs to be heard. I took that view into my ministry when I was a pastor in the inner city where I sought to empower people to creatively run their own programs irrespective of race or ethnicity. I realized that I could take that approach to relationship-building and use it in other nonprofit organizations. I needed to build relationships not only with board members in
order for them to get to know each other but also with my staff. From my perspective, relationship-building is critical to achieving successful mergers.

The merger thrust me into a new role. It began in the broader community where I met with county agency directors and business leaders and this proved to be critical when county and state agencies were making decisions on what they were going to fund. There needs to be somebody from the agency in the middle of those discussions to make sure that the agency’s point of view is heard. In the first five months prior to the start of the merger discussions, I was networking with at least 30 different key leaders within the county and I built on those relationships and kept them posted throughout the merger process. So if I hadn't hit the ground running for those first couple of months prior to the merger, I'm not sure I would have maintained so much external community involvement throughout my stewardship of this merger process. I now feel that I have done my work of saving YFA, merging it with FACES to form YFES, and growing the merged agency budget to $10+ million in five years. So now I can move on to my next challenge. I think I do better at building rather than maintaining nonprofits.
ATTACHMENT C

MISSION STATEMENT

Youth and Family Enrichment Services (YFES)

As a private non-profit agency in San Mateo County YFES provides a wide array of free and low-cost services to help children, teens and adults who are dealing with substance abuse, domestic violence, mental health, relationship and communication issues.

- We help people discover strengths that they didn't know they have, and use them to overcome their challenges.

- We provide assistance at every step of the way, by providing prevention, early intervention, education, counseling, and residential services.

- We realize that most situations are complex—sometimes we work with individuals, sometimes a whole family. Some clients are able to focus on one issue, and others must tackle many interrelated issues at once.

- We value young people as vital community resources, and encourage people to find new ways to build relationships between youth and adults.

Most importantly, we treat every person with respect, and in many cases mold our services to meet the needs of our clients and participants.

Mission and History

Our mission is to strengthen communities by empowering youth, families and individuals to overcome challenges through counseling, education, and residential services.

YFES’ sixteen programs serve more than 34,000 individuals in San Mateo County each year from nine locations throughout the county.

YFES was created in July 2003 by the merger of Youth and Family Assistance (YFA) and Family and Community Enrichment Services (FACES), two of San Mateo County’s most reputable non-profit agencies.

In response to the downturn in the national economy and the resulting cuts in public and private funding, the Boards of both agencies decided in January 2003 to join forces to ensure the continuing provision of high-quality services to the San Mateo County community. The merger enabled the agency to reduce costs by an estimated $500,000 annually, which prevented the need for making drastic cuts to service programs.
Before the merger, both organizations had each served youth and families in San Mateo County for nearly 30 years. Family and Community Enrichment Services, Inc. (FACES) was founded in the early 1970s as an alternative to the juvenile justice system for youth coming into contact with law enforcement. FACES operated ten different programs, with the mission of strengthening families and building a healthier community.

Youth and Family Assistance (YFA) began operation in 1976 as part of the Sequoia YMCA’s youth development efforts. YFA operated 9 different programs, with a mission to promote the physical and emotional well-being of youth and families by providing a comprehensive network of services that decreased high risk behaviors, increased self-reliance and strengthened healthy family environments.

Today, the rich history of service and the combination of programs from both agencies enables YFES to provide a comprehensive array of free or low-cost, multi-lingual social services.
VALUES STATEMENT

Values

The following values guide and inspire our efforts to help individuals and families to transform their challenges into opportunities:

We Value:

Respect and Empathy:
We are committed to treating everyone with whom we interact with the same dignity and consideration that we would want ourselves. We value each individual's unique personal, cultural, and professional qualities and contributions.

Excellence:
We are committed to upholding the highest level of ethical and professional standards in our dealings with the people we serve, our partners and communities, and in our work with each other. We are constantly engaged in self-reflection and a quest for improvement, and seek to apply the best available practices in our fields. We reward creative approaches to challenges, at both the personal and organizational levels. We are committed to providing opportunities for staff and clients to grow personally and professionally.

Integrity:
We value personal and professional integrity, which enables us to build relationships upon credibility and mutual respect. We are committed to being honest, ethical, moral, and lawful in all of our activities—to do the right thing, even if it is not the easy thing to do.

Strength-based, Holistic Approach:
We realize that problems rarely appear in isolation, and work to identify the social, emotional, intellectual, financial, and spiritual needs of our clients, which can sometimes include mental health, addiction, family systems, housing, trauma, physical health, and nutrition issues. We identify a person's strengths, and use them as a foundation from which to meet their challenges. We are committed to helping both staff and the people we serve find, recognize and build upon their internal and external resources. We believe that staff must model the self-care that we advocate for our clients and be healthy, responsible, and respectful. We value youth as vital community resources, and encourage people to find new ways to bridge the gap between youth and adults.

Diversity:
We seek and respect a diversified staff. It is our belief that diversity promotes appropriate responsiveness to community needs, provides representative role models for all clientele, and in numerous ways improves the quality of service. In order to provide culturally-sensitive service,
we recruit staff, leadership and Board members to reflect the diverse population of our community.

**Commitment and Passion:**
We value passion, because it is the driving force of the work we do. Our staff is united in a strong commitment to give back to the community and help those in need, and takes great pride in their work.

**Teamwork and Collaboration:**
We encourage staff and leadership to communicate, cooperate and respect each other's needs in order to reach our common goals. We foster collaboration and partnership between and among departments, programs, functions, as well as with other agencies, funders and partners.

**Accessibility and Flexibility:**
We are committed to being available to the community we serve by providing 24-hour services as necessary, fostering relationships with clients, responding in a timely manner and showing that "what happens to you matters to me." Our staff is available to each other for encouragement, self-reflection, input and listening. We strive to meet the people we serve "where they are," both physically and emotionally. We are aware that nobody is perfect, and that everyone has a different path. We honor small steps and incremental progress.

**Accountability:**
We help the people we serve to meet the goals they set for themselves. We respect the commitments that we make to our funders and partners by collecting appropriate data, providing timely and complete reports, and ensuring that we meet our goals and objectives.

**Fiscal Responsibility:**
Careful management of our financial resources demonstrates our respect for the government agencies, foundations and other donors who make our work possible. We are committed to ensuring that we have adequate resources to meet our commitments, and finding creative ways to finance our vital community programs in an environment of economic uncertainty. We will set appropriate fees for our services, and will set appropriate boundaries in requiring payments from clients.
ATTACHMENT E
MERGED ORGANIZATION CHART
<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The goals of this program have been clearly articulated.</td>
<td>49.52%</td>
<td>44.76%</td>
<td>4.70%</td>
<td>0.00%</td>
<td>0.95%</td>
</tr>
<tr>
<td>2. I understand the goals of the program.</td>
<td>51.43%</td>
<td>43.81%</td>
<td>4.70%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>3. This program is effective in reaching goals.</td>
<td>33.33%</td>
<td>58.10%</td>
<td>5.71%</td>
<td>0.00%</td>
<td>2.86%</td>
</tr>
<tr>
<td>4. This Program provides quality service and care to clients.</td>
<td>61.90%</td>
<td>37.14%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.95%</td>
</tr>
<tr>
<td>5. Creative thinking and problem solving are encouraged in the staff.</td>
<td>65.71%</td>
<td>34.29%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>6. There are people on the team I can talk to if I need support or information.</td>
<td>74.29%</td>
<td>24.70%</td>
<td>0.95%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>7. I feel part of a team working for the good of our clients.</td>
<td>65.71%</td>
<td>33.33%</td>
<td>0.00%</td>
<td>0.95%</td>
<td>0.00%</td>
</tr>
<tr>
<td>8. Staff members treat each other with respect.</td>
<td>60%</td>
<td>40%</td>
<td>0.00%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>9. Program changes are positive and are leading the program in the right direction.</td>
<td>42.86%</td>
<td>48.57%</td>
<td>3.81%</td>
<td>0.00%</td>
<td>4.76%</td>
</tr>
<tr>
<td>10. Staff morale is high in this program.</td>
<td>36.19%</td>
<td>55.24%</td>
<td>8.57%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>11. Disagreements among staff members are handled well.</td>
<td>29.52%</td>
<td>52.38%</td>
<td>4.76%</td>
<td>0.00%</td>
<td>13.33%</td>
</tr>
<tr>
<td>12. The program builds on the assets and strengths of clients.</td>
<td>41.90%</td>
<td>49.52%</td>
<td>0.55%</td>
<td>0.00%</td>
<td>7.62%</td>
</tr>
<tr>
<td>13. The Manager's impact on the staff and program is positive.</td>
<td>47.62%</td>
<td>50.48%</td>
<td>0.95%</td>
<td>0.00%</td>
<td>0.95%</td>
</tr>
<tr>
<td>14. Overall, I am satisfied with my job.</td>
<td>50.48%</td>
<td>48.57%</td>
<td>0.95%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>15. This program is culturally competent.</td>
<td>53.33%</td>
<td>46.15%</td>
<td>0.76%</td>
<td>1.90%</td>
<td>3.81%</td>
</tr>
<tr>
<td>16. I have recently received feedback that I am doing a good job.</td>
<td>43.81%</td>
<td>49.52%</td>
<td>4.76%</td>
<td>0.00%</td>
<td>1.93%</td>
</tr>
<tr>
<td>17. I am given the opportunity to stretch my skills and professional development is encouraged.</td>
<td>53.33%</td>
<td>44.76%</td>
<td>1.90%</td>
<td>0.00%</td>
<td>0.00%</td>
</tr>
<tr>
<td>18. I am able to make independent decisions to do my job effectively.</td>
<td>55.24%</td>
<td>40.95%</td>
<td>0.95%</td>
<td>0.00%</td>
<td>2.86%</td>
</tr>
<tr>
<td>19. The Manager is responsive to internal/external program issues.</td>
<td>54.29%</td>
<td>39.05%</td>
<td>3.81%</td>
<td>0.00%</td>
<td>2.86%</td>
</tr>
<tr>
<td>20. Program staff meetings are productive and worth the amount of time.</td>
<td>23.81%</td>
<td>47.62%</td>
<td>13.33%</td>
<td>0.00%</td>
<td>15.24%</td>
</tr>
<tr>
<td>Question</td>
<td>Percentage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21. Program Manager demonstrates cultural competency in dealing with staff.</td>
<td>48.57% 39.05% 0.95% 0.95% 10.48%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22. When concerns or problems are raised, there is prompt and sufficient follow-up by the manager.</td>
<td>44.76% 47.62% 4.76% 0.00% 2.86%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23. Program Manager provides me with constructive feedback about my job performance.</td>
<td>40% 53.33% 4.76% 0.00% 1.90%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24. Program Manager provides me with positive feedback about my job performance.</td>
<td>44.76% 49.52% 4.76% 0.00% 0.95%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total: 105