

Guided by Mission Alignment: The Merger of **STAND! Against Domestic Violence** and the **Family Stress Center** to form **STAND! for Families Free of Violence**

Organizational Strengths Grant Case Study

This case study was developed with support from Blue Shield of California Foundation, through the Strong Field Project (SFP), to share the story of STAND!'s merger process with the larger domestic violence field. It is informed by interviews with STAND! leaders and materials published by the organization.

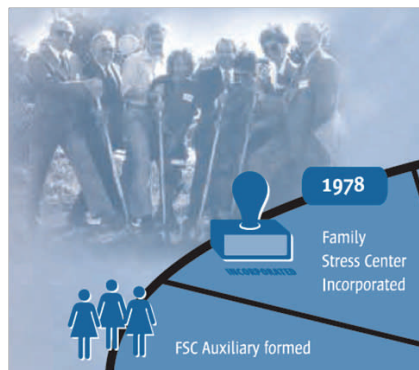
Organizational Background: Distinct Organizations with Common Roots

STAND! Against Domestic Violence and the Family Stress Center merged in 2010 to form STAND! for Families Free of Violence. The merger integrated the services, operations, and philosophies of two well-established organizations, one that addressed child abuse and another focused on domestic violence. The result is a stronger organization with a complete spectrum of prevention, intervention, and treatment programs. An Organizational Strengths Grant (OSG) received through Blue Shield of California Foundation's Strong Field Project (SFP) was instrumental in supporting the successful merger process.



When the Family Stress Center first approached STAND! Against Domestic Violence to explore the potential of merging, the individuals involved did not realize that the two organizations actually shared common roots. Both were established in 1977 as volunteer-run organizations, with strong support from the Junior League of the East Bay. At that time, there was some discussion of joining forces, but the decision was made to establish two separate entities. Over the years, both organizations grew, professionalized, and expanded to offer a broad range of services.

STAND! Against Domestic Violence grew out of a volunteer-staffed, peer-based, call-in crisis line for victims of domestic violence, initially named CALL, Inc. The organization grew quickly, changing its name to Battered Women's Alternatives (BWA) and adding a range of services to support survivors of domestic violence: a shelter, legal advocacy, counseling, transitional housing, assistance with employment, and support groups. In the early 1980s, BWA added programs for boys and men. The organization was one of the first in the state to offer batterer intervention and clinical treatment for both survivors and batterers. A few years later, the organization realized the importance of more proactive prevention and began outreach programs to young people, primarily in high schools. By 1985, more than 30 staff members were implementing intervention, prevention, and treatment programs. In 2000, the organization changed its name again, to STAND! Against Domestic Violence, to better reflect its broad constituency and wide range of services.



The Family Stress Center (FSC) was formed to serve victims of child abuse and neglect. Early programs, provided by volunteers, offered support to parents with young children and community education about child abuse. As it grew, FSC expanded the scope of its services to include child, family, individual, and in-home counseling, anger

1. Note on language: Because the merged organization's name is very similar to the name of one of the pre-merger organizations, the pre-merger organization will be referred to as SADV (or the full name, *STAND! Against Domestic Violence*), while the post-merger organization will be referred to as STAND! (or the full name, *STAND! for Families Free of Violence*).

management classes, parent education classes, short-term respite child care, kinship provider support groups, a Latino Family Resource Center, and Proud Fathers (a job readiness and parenting program for fathers.)

In 2007, the long-time Executive Director of FSC retired. During this period of transition, the Interim Director and the Board of FSC considered many options for the future of the organization, and began exploring the possibility of merging with another nonprofit. To investigate this scenario, FSC leaders conducted informational interviews with a number of organizations in Contra Costa County, including SADV. Through the series of conversations that resulted, leaders of both organizations concluded that a merger offered interesting opportunities, and the boards of both organizations committed to further exploration. At this point, SADV sought support to manage the early steps of the merger.

Readiness and Vision for Change

Before the merger, the boards of directors and senior leadership of both organizations saw a clear alignment between their respective missions and programs. While each had started from a different point of entry, focusing on either domestic violence or child abuse, the evolution of both organizations had involved developing programs that engaged a full spectrum of family members in preventing and addressing violence in the family. Both were aware of academic research that clearly pointed more and more to the advantages of holistic and comprehensive approaches to ending family violence. The merger offered an opportunity to develop an even more integrated, full-spectrum approach. It could also result in a stronger organization with a broader base of support and unified operational systems.

"We have a history of taking risks when we believe it will strengthen our work. For example, when we added programs for men, it was highly controversial; domestic violence programs had focused on women, and we stepped out of that mold. We're proud of that history. So we approached the merger as an opportunity to learn, and started from a place of curiosity, with openness to try new approaches and new ways of thinking."

-Gloria Sandoval

SADV hired a consultant with expertise in nonprofit mergers, La Piana Consulting, to conduct the vetting process, develop a merger plan, and act as facilitators to a Joint Merger Negotiation Committee. The finances, management structures, and operational systems of both organizations were compared to assess fit.



While there did seem to be an instinctual alignment in the mission and vision of the two organizations, the prospective merger required the leadership to examine and articulate the connection. The two organizations had operated entirely separately for years. Why join forces now?

SADV had always seen itself as an organization that was constantly learning, seeking input and ideas from others. Gloria Sandoval, Executive Director of SADV (and now of STAND!), believes that this learning orientation was a significant strength as the organization considered the merger.

Another strength going into the merger process was that Ms. Sandoval had previous experience managing significant organizational changes. She was aware of the value of outside consultants, as well as the need for attention to internal culture change. Though she appreciated opportunities to work with consultants, the merger process marked the first time the organization had been able to fully access this type of support and expertise in an ongoing way.

Organizational Strengthening Process

Merging two distinct organizations with strong identities and thirty years of history is not a simple task. The process had several distinct phases. The first phase took 4 months; the next two phases combined required about 18 more months. Ms. Sandoval believes that at least one more phase is still to come.

Phase 1: Exploration

In this phase, the leaders of the organizations met together and independently to assess the level of interest in a merger. Are the organizations sufficiently aligned in vision, mission, and programs to explore the idea further? This phase was initiated when FSC approached SADV for an informational interview. Ms. Sandoval then brought the idea to the senior leadership team at SADV. The team understood the potential connection between the missions of both organizations, and the idea was broached to the Board of Directors. During a series of conversations, the boards of both organizations affirmed mutual interest in taking the next step in the process. At this point, SADV sought the support of the Strong Field Project.

Phase 2: Preparation

A *Joint Merger Negotiation Committee* was formed to examine and negotiate the details of the potential merger, with representatives from both organizations. An outside consultant, La Piana Associates, conducted a comprehensive investigation to evaluate the risks and benefits of merging, commonly referred to as *due diligence*. The consultant examined and compared the by-laws, finances, personnel policies, and operational systems of both organizations and developed summaries for the leadership team and boards of directors to review.

This vetting process uncovered some challenges. For one thing, FSC was carrying a significant amount of debt. It also became clear that the management structures of the two organizations were different. SADV had more tiers in its staffing structure, and though both organizations used similar job titles, they did not refer to the same level of responsibility. For example, positions titled Program Directors at FSC had responsibilities equivalent to SADV Program Managers, a position with less responsibility and lower pay. La Piana also found that there was a more formal management structure in place at SADV than at FSC; in addition to the Executive Director, SADV had a senior management team, which was not the case at FSC. These differences raised questions about the appropriateness of the merger.

To prepare for the merger, the Board of Directors and senior-level staff of SADV conducted multiple planning scenarios, considering how to be ready in all areas of the organization. Decisions also had to be made about aligning human resources, and how to integrate fiscal management and technical systems.

As part of the exploration, The Joint Merger Negotiation Committee crafted a potential mission statement that encompassed the work of both organizations, chose a name for the new organization, and articulated values shared by both organizations.

A proposal to merge was brought to the boards of both organizations; they both approved the decision. All board members of both organizations were invited to join the board of the new organization and most renewed their commitments in this way. The by-laws of both organizations were reviewed and incorporated into a single document that would be adopted by the new organization.

Once these essential steps were taken, the leaders of both organizations engaged their key funders and community partners to collect input on the new mission and vision, an important step that gave their supporters opportunities to ask questions and give input before any public announcement was made.

One key issue was how to staff the new organization. The decision was made to incorporate the existing staff members of both organizations as much as possible; so, with the exception of duplicative positions, all staff members were offered positions in the new organization. There were differences in personnel practices and policies to contend with. The titles, position responsibilities, pay rates, and benefits of the two organizations all had to be adjusted. One major issue was that FSC had higher pay rates and benefits. The leadership team had to identify a fair staffing and compensation structure that would also be sustainable for the fiscal health of the organization. To adjust to the new structure, about one-third of the staff saw increases in pay, another one-third received cuts in pay, and the remaining third did not experience a change. Some employees of FSC declined the offer to join STAND! under these terms, and one full program had to be re-staffed.

"We each had times of questioning: Is it worth it? Will it really help us? It seemed to come up for each of us at different times. Working on it as a team really made a difference, because we could give each other perspective and work through the challenges together."

-Gloria Sandoval

All the staff members at SADV were informed of the merger well before it was formalized, though the planning largely took place at the senior levels. The situation at FSC was different; with a part-time, interim Executive Director, FSC did not have the same capacity to prepare for the coming change. As a result, the staff members of FSC were largely unaware of the details of the merger until it actually happened, creating one of the biggest challenges of the merger process.

Phase 3: Integration

The process of integrating the two agencies began after the merger was formalized in July 2010. Every area of operations was involved, with changes concentrated in the following key areas.



Theory of change: Each organization brought with it a certain theoretical analysis of its work. SADV identified with the movement to end domestic violence, which historically had an activist orientation and had developed through women organizing to support one another, referred to as a peer-based approach. FSC’s focus on child abuse had a different history as a social service that shared origins with the movement against animal cruelty.

The human process: On July 1, 2010, the official date of the merger, STAND! held a “Merger Kick-Off All-Staff Meeting,” the first gathering of the entire staff of the new organization. The leadership team designed the day-long meeting as a celebration of the merger and an introduction to the new, larger, more comprehensive agency.

Unfortunately, the staff members who had been with the Family Stress Center had not received much formal communication about the merger. Unbeknownst to the STAND! leadership team, false rumors and misinformation were swirling at FSC prior to the merger, with stories of layoffs and disparities between the treatment of FSC and SADV staff. These staff members were understandably concerned, upset, and not at all ready to celebrate. Fortunately, the leadership team was able to adapt the day’s plan. The agenda was shifted to hear staff concerns and promote open communication between the full, newly integrated staff and the leadership team.

This rocky start was the first step of cultural integration between the two organizations. STAND! sought support from Performance Consulting, a management consulting firm with expertise on integrating staff following a merger. This team of consultants facilitated a four-step process to blend the two staffs into a cohesive team working together toward a common goal. This process also addressed the changes in staffing structure, establishing the roles and expectations in the newly defined structure.

First, every STAND! staff member had the opportunity to meet in small groups with the consultants, without the presence of their supervisors, to speak freely about their hopes and concerns. Former FSC staff members had the opportunity to meet with the consultants for extra time. Performance Consulting then issued a report summarizing the interviews and meetings (with confidentiality protected) to the senior management team, who then released the report to the entire staff, in order to be fully transparent and cultivate trust.



Staff members then met in larger groups of fifteen, again without supervisors present, with the Performance Consulting professionals. These teambuilding sessions created the opportunity for staff members who had been strangers to get to know one another and form the professional relationships necessary for a high-functioning agency. Finally, Performance Consulting led another all-staff meeting in August 2010, capitalizing on the lessons learned up to that point and conducting team-building exercises. This process demonstrated that the new agency would act as one, with all voices being heard and respected.

“The domestic violence field has a theory of change that includes a political analysis of power and control. That is a big part of our training for advocates and links us politically with other organizations that do this work. Child abuse intervention tends to be more clinical, without the same type of political link. These worldviews shaped the cultures of our two organizations. When we merged, we found we all had to be open to learn from each other, and adapt to new ways of thinking.”

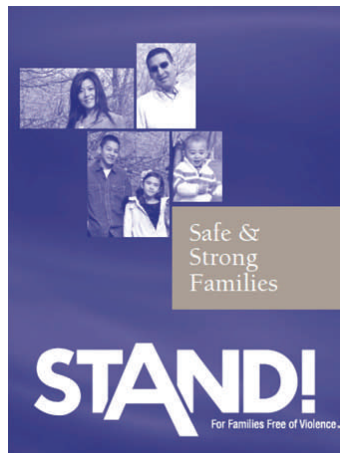
-Gloria Sandoval

During the first year after the merger, STAND! continued to conduct monthly all-staff meetings where an open dialogue was encouraged. The December 2010 meeting, presented as a holiday celebration, was a turning point in the staff integration process. Staff members sang, danced, and played games together. The good cheer at this event demonstrated that the staffs had truly come together and the team-building process was on the right track. Monthly all-staff meetings continued until the one-year mark, to ensure that STAND! was operating effectively with a unified staff working together with a common purpose. Although the merger process was demanding for staff members, there was surprisingly low staff turnover, with staff members who had previously worked at both organizations fully committing to shape the new organization together.

Program schedules and locations: Throughout the first year of the merger many practical challenges had to be overcome. Staff schedules and location assignments had to be reworked, including the consideration of how to strategically place the organization's staff and programs across facility sites. In some cases this meant actually consolidating functions into one location. For example, the clinical services that had been dispersed through various locations among the two organizations were brought together in one location and integrated into a single team. Similarly, the administrative offices were brought into one location, with expanded staffing and space. In other cases, it meant moving programs to a new location, in order to bring programs into areas of the county that had been underserved.

Cross-training and program adaptation: There were programmatic adjustments to make as well. The 40-hour domestic violence training that had been developed by SADV was expanded by 15 hours to incorporate child abuse issues. Staff cross-training led to increased internal referrals between the domestic violence and child abuse programs. A new program, drawing on insights from SADV's batterer intervention programs, was added to offer violence prevention education to parents.

Technology integration: Financial support provided for the merger process enabled the organization to invest in infrastructure. Integrating the technology systems of the two agencies was the most straightforward of the objectives of the merger process. A new computer network and phone system had to be established to support the expanded staffing structure. This included purchasing and setting up 35 new computers to replace outdated equipment. The new unified phone system allows STAND! to forward calls to cell phones and dial from one extension to another even when callers are physically in different locations. STAND! was able to rely on its Information Technology Department to accomplish these tasks. Finally, STAND! selected and implemented a new unified and flexible client database across all programs. STAND! chose the Efforts-to-Outcomes (ETO) database from the company Social Solutions. ETO enables STAND! staff members to adjust the input fields to the specific design of each program and create customized reports for each funding agency.



Public relations: Finally, STAND! had to communicate the merger to the community at large. To do this, it had to completely revamp agency materials to reflect the new identity and broadened focus. This involved drafting and refining new language, selecting a new color scheme, redesigning all the outreach and marketing collateral, and developing a new, comprehensive website. In the quarterly newsletter, there is now at least one story that is specific to domestic violence, and one that is specific to child abuse, as well as a story that explores the interrelationship between the two. Through the process of creating the new branding and communications strategies, the marketing skills of the staff members increased.

Emerging Outcomes

The merger has been a success on multiple levels: operations, services, staffing, and visibility in the community. Beyond these tangible indicators is a larger success: the merger has led the organization to a new theory of change that has brought it new insight and energy. The benefits from this new perspective are still unfolding, placing STAND! in a cutting-edge position in the domestic violence field.

Stronger finances: STAND! is stronger financially than either organization was separately. Pooling the support for two organizations created a broader base of support, which allowed greater funding flexibility. This flexibility in turn allowed the organization to stay strong financially even through the downturn of the U.S. economy. The budget combines the funding resources of the two former organizations, yet has streamlined expenses with consolidated administrative functions, creating greater financial flexibility. The merger process also strengthened the staff's fiscal analysis abilities and its familiarity with financial planning models.



Increased local visibility and new partnerships: The merger has led to increased visibility in the local community, as well as new partnerships, particularly with mental health and substance-abuse treatment providers. Staff members used the new outreach and marketing materials to reach out to other service providers, to inform them of the changes and encourage referrals. STAND!'s clinical director built relationships with counseling programs offered by the county and others to help ensure that clients with mental health issues receive needed services. The improved relationship between STAND! and the county has also led to a shift in county policy. In the past, the county had insisted that victims of domestic violence and child abuse did not need specialized treatment. After the merger, STAND! was able to successfully advocate that family violence victims receive referrals to relevant services with practitioners who have a depth of expertise in these issues. This has led to new and productive relationships with other clinical service providers across Contra Costa County.

"Although intellectually we get the connection between domestic violence and a lot of other things—violence in the community, child abuse, gang violence, substance abuse—the merger has made those interconnections much more real within this organization. I feel like [we] have gained some tremendous insight into the relationship to those other ancillary issues and it has made it easier for us to talk about it publicly and connect the dots for people in a way that we were not able to do before."

-Gloria Sandoval

More comprehensive services: Most importantly, the merger created a single organization that is able to address family violence with greater breadth and depth. Weaving together the programs from the two agencies led to a full-spectrum approach to end all forms of violence in the family. The entire family unit becomes the client, with the ability to access services from one agency in a single location. STAND! offers prevention education before violence occurs, intervention when violence erupts, and treatment after abuse occurs so that people can heal, and the intergenerational cycle of violence can be interrupted. These services are offered in a broad range of settings, such as schools and faith communities, as well as through confidential intervention and treatment programs.

Stronger leadership role in the field: The innovative merger of child abuse and domestic violence agencies into a comprehensive family violence agency has drawn attention from across the field. STAND! leaders have been invited to share what they've learned from the merger process with organizations across California and the United States. Leaders at STAND! describe this interest as an unexpected resource that lends energy and excitement to their continued integration work.

A new view of family violence: Going into the merger, the leaders of both organizations had a sense that domestic violence and child abuse were related. They knew that joining forces would prompt them to reframe their work. Still, the actual experience of this process has led to unexpected insights that have been eye-opening for STAND!'s staff members and leadership.

The merger prompted both FSC and SADV to review the theoretical framework of their work. Staff members in both organizations shared an understanding of the intergenerational nature of violence in the family, but neither had fully considered how their focus issue (either child abuse or domestic violence) interacts with other dynamics in the family. For the staff members formerly with FSC, working within a social movement, with a political analysis of power and control, was a new perspective that added new insights on working with violent family members. On the other hand, staff members formerly with SADV were challenged to broaden their sense of the client base. To their surprise, they found they had previously fallen into the perspective that family violence is generally about a man abusing his partner and children. With child abuse now a part of their focus, it was clear to them that women can also be abusive. To make sense of the new picture, the staff members of the merged organization re-examined the similarities among all of their clients. A full picture emerged, demonstrating that all of the clients had experienced trauma.

This insight helped staff members, particularly those formerly at SADV, to realize that they had previously relied on “us-versus-them” thinking, which had oversimplified the full story of family violence. At times the “victim” in one situation can be the “offender” in another, such as a woman who is abused by her husband, and is abusive to her children. This new perspective on how an individual’s experience of trauma can perpetuate violence prompted STAND! to shift its approach to working with clients. Each client is welcomed fully, asked to share her or his story, and encouraged to express her or his goals. This approach puts the client in the driver’s seat of her or his own change process, which takes place in the context of the family system.

In this way, the merger has altered the mindsets of the employees, moving them to embrace a more holistic and comprehensive view of family violence that explicitly acknowledges the role trauma plays in people’s lives. Because of this new perspective, the staff members feel that they have a larger platform from which to address interrelated social issues and make the broad effects of family violence more widely known.

Looking Ahead

STAND! continues to strengthen organizational management. For example, through the Strong Field Project, STAND! was connected to the Non-Profit Finance Fund, which helped them perform some financial modeling and consider the costs and benefits of different organizational structure scenarios.

The organization also continues to learn about the complexity of both domestic violence and child abuse, how they affect families, and how to best offer comprehensive services that address the two interrelated issues. A new 18-month strategic plan for implementing full service unification established the objective of becoming a “trauma-informed organization.”

STAND! applied for and received continued support from the Strong Field Project to further unify its programs. The organization has engaged Zia Partners, a firm with expertise in integrating large-scale systems and building new client-responsive systems. Together they intend to examine how a trauma-informed approach may impact every aspect of the organization.

The process will build on the merger, continuing to address cultural and programmatic integration. For example, though the programs frequently cross-refer, for the most part they still operate separately, as they did before the merger. Engaging the program managers and directors in the question of integration, and exploring structures that are conducive to a full-spectrum, trauma-informed approach will challenge the team to be open to new possibilities. Through this process, STAND! anticipates that its program models will change.

There is a sense of excitement and discovery about integrating cutting-edge, evidence-based practice into STAND!’s services, a sense that it will lead to new and innovative approaches to ending family violence. STAND! staff members have gained a broader understanding of the impact and meaning of their work, and STAND! leaders hope to formalize this insight and share it with the broader field. STAND!’s Executive Director Gloria Sandoval has the following recommendations to share with organizations that are considering a merger of their own.

Let the mission guide you. The process of integrating the people, systems, and messaging of two separate organizations is challenging, but if the missions of the organizations are clearly aligned, it establishes the foundation for the merger’s ultimate success.

Human transition is as important as system conversion. Bringing together two organizations means integrating two separate cultures. To support this process, it is important to be as transparent as possible with the staff members of both organizations, to encourage trust and facilitate participation in the process.

External consultation is essential. Mergers can be contentious at moments. It is natural to feel territorial or uncomfortable when one’s perspective or culture is challenged. A neutral third party can help manage the tension and guide it into productive energy for the process.

Be open to new insights. When two points of view interact, new perspectives may emerge. It is impossible to fully anticipate what new insights will surface through a merger, so embrace the learning process!

“STAND! is a catalyst for breaking the multi-generational cycle of violence, promoting safe and strong relationships, and rebuilding lives.”

-STAND!’s mission statement