

Strategic Alignment in Times of Change: Mergers, ASOs, and Back-Office Innovation in an Ever-Changing Landscape

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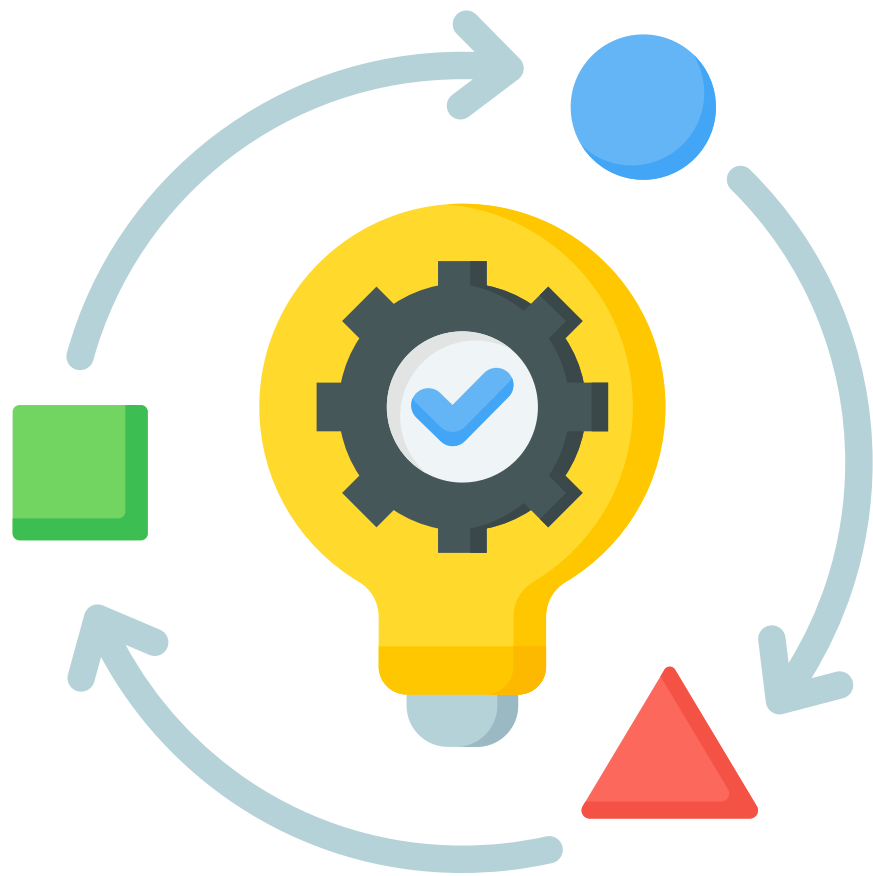


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THE BRIDGE TO WHERE YOU WANT TO BE

Welcome and Framing the Conversation

- Transformation in nonprofit and healthcare industries
- Urgency - financial, regulatory, and workforce pressures
- Resilience



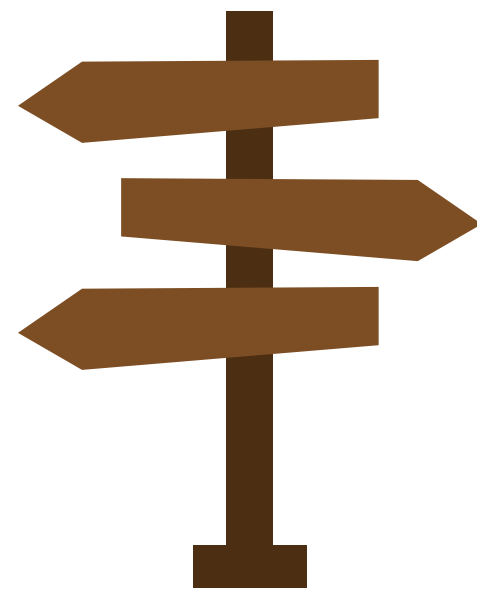
The question isn't whether we change, but rather how we do it in a way that protects mission, values, and people.

The Current Landscape and Why Change is Necessary

Understanding the drivers behind organizational restructuring:

- Funding shifts
- Workforce shortages
- Payer consolidation
- Accountability demands

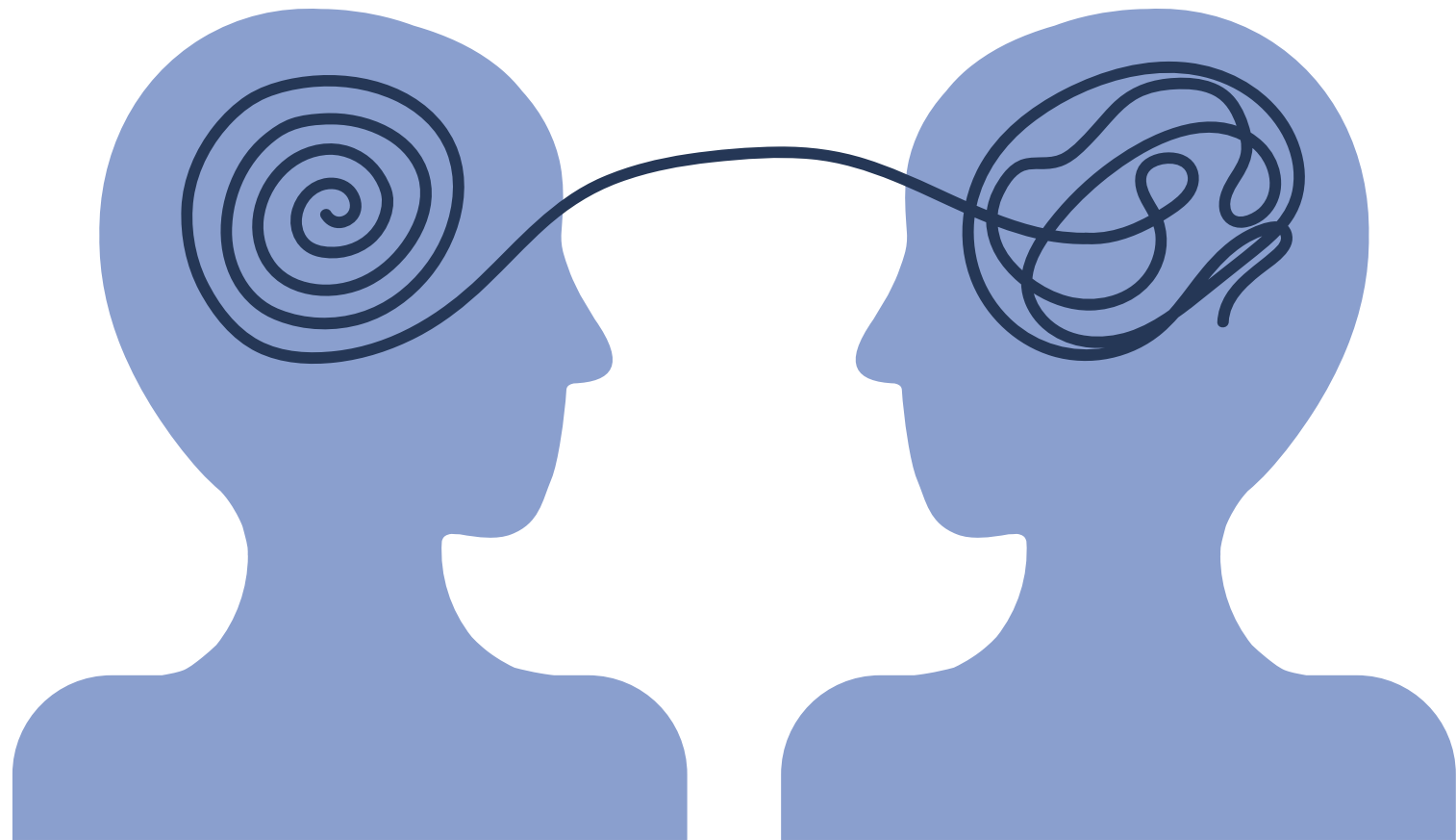
How can organizations adapt strategically, not reactively?



Reducing Fear and Stigma Around Mergers and Collaboration

Identifying strategies to address leadership and board concerns:

- Fears - loss of identity, mission drift, board redundancy, loss of autonomy
- Psychology of change - how does fear manifest in different areas of org
- Leadership - transparency, shared vision, mission enhancement



What are you afraid to lose?

Structural Options for Combining Resources

Models for collaboration and efficiency:

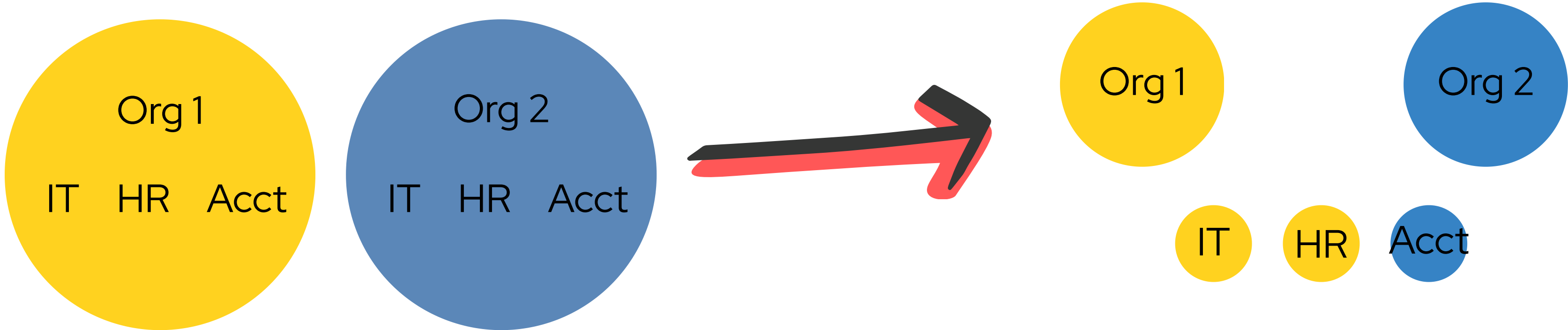
- Option 1: Shared Back Office Functions - Accounting, HR, IT, Grant Management
- Option 2: Administrative Services Organization (ASOs) - Third Party Back Office Functions
- Option 3: Formal Mergers - Subsidiary v. full merger



Start small. Build trust, then expand.

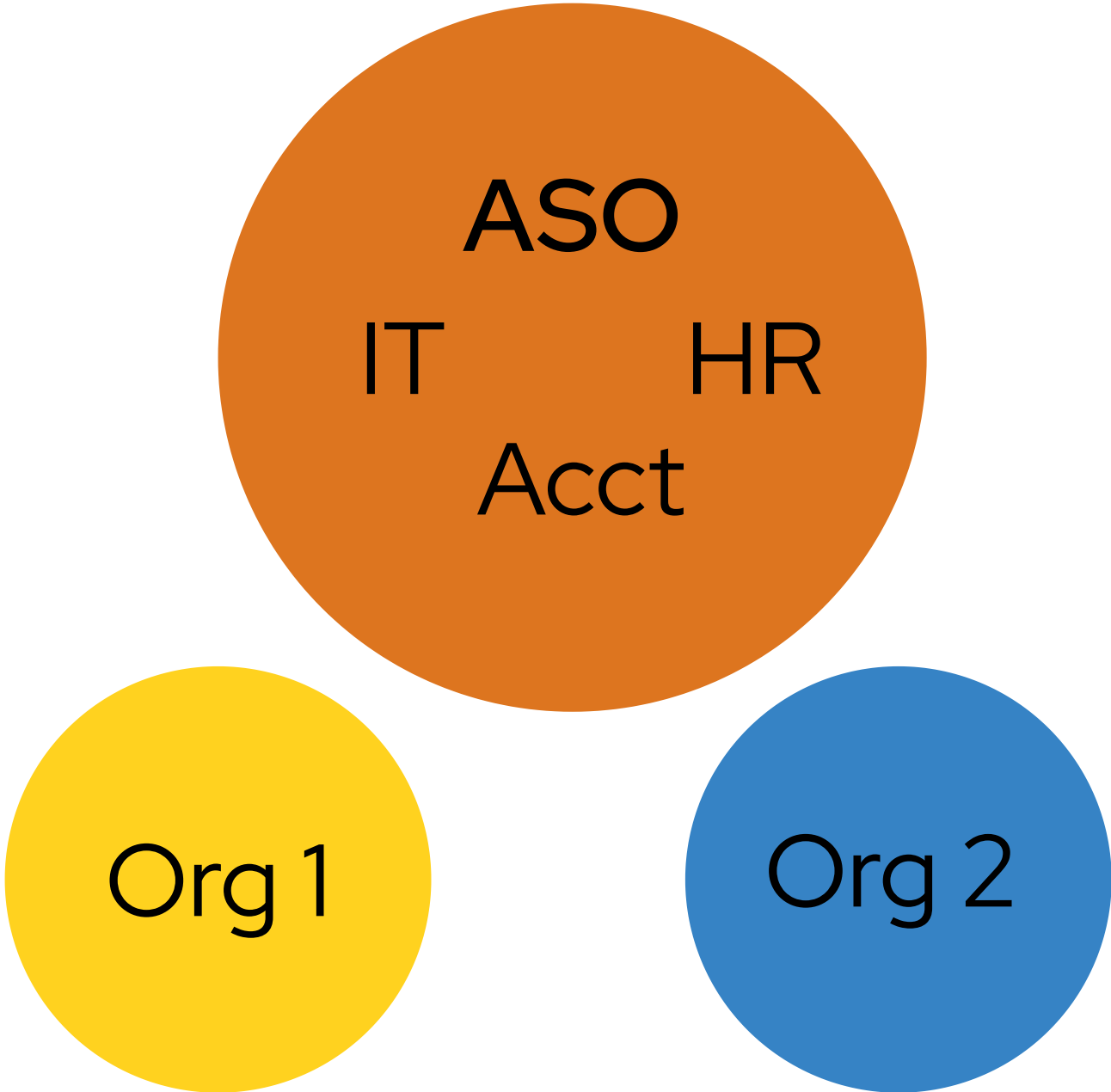
Structural Options for Combining Resources

Option 1: Shared Back Office Functions



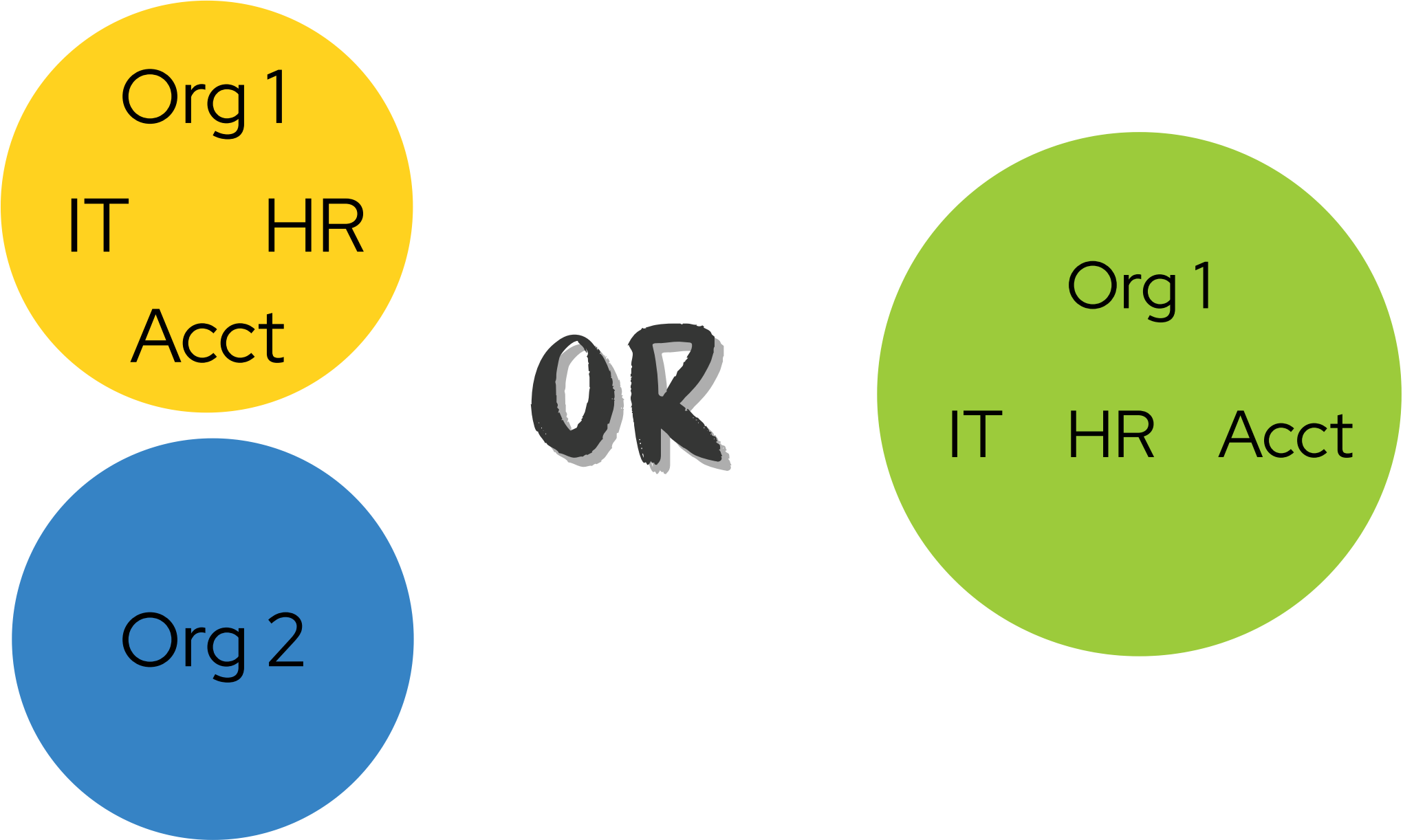
Structural Options for Combining Resources

Option 2: Administrative Services Organizations



Structural Options for Combining Resources

Option 3: Formal Mergers



Navigating Leadership and Governance Challenges

Build Consensus and align leadership:

- Engage boards early - alignment is stewardship
- Consensus building tools - joint planning sessions, neutral facilitation, transparency



Communication, communication, communication.

Resources and Tools for Transformation

Access tools and support network:

- Statewide associations, consultants, collaboration networks (MALA, MPHI, Incompass)
- Grant opportunities for merger exploration or shared services
- Sample framework for due diligence and organizational assessment



Don't reinvent the wheel, just borrow it.

Wrap up and Q&A

Summary:

- Change is necessary, but can be strategic and empowering.
- Collaboration isn't loss.
- Resources are available for every step.



The most resilient organizations don't avoid change, they align around purpose and move together.