

Thinking About Merger Workshop

Date: Tuesday 27th September

Time: 10.30am to 1.00pm

Venue: Esmée Fairbairn Foundation
Kings Place
90 York Way
London
N1 9AG

Numbers: There will be a maximum 20 participants

Cost: The workshop is free for participants

Booking: IVAR will be dealing with the administration for the event.
If you would like to book please e-mail diana@ivar.org.uk with the following information:

- Which funder sent you the invitation?
- Name
- Job Title
- Organisation
- e-mail address
- Telephone number

Places will be allocated on a first-come, first-served basis, but if the event is heavily oversubscribed we will try to organise a second event before Christmas.

Overview:

Voluntary organisations are coming under increasing pressure to consider merger as a means to stability or survival. Thinking about merger is one of the most challenging issues a voluntary organisation can address - aside perhaps from formation or closure. It can create tensions as well as excitement, be the cause of much debate and lead to permanent and irreversible change. Contrary to some of the enthusiastic claims made about merger, research carried out by IVAR (the Institute for Voluntary Action Research) suggests that it should be treated with care and caution.

This workshop is for chief executives (or equivalent) who want to develop a more in-depth understanding of the different dimensions and implications of entering into a merger process. The session will be based around IVAR's '*Thinking about ... merger*' publication and each participant will receive a free hard copy.

The workshop will begin with a presentation by Ben Cairns, IVAR's Director. There will also be contributions from Ben Hughes, former chief executive of bassac (which recently merged with DTA to form Locality) on the lived experience of a merger, and from Lawrie Simanowitz, partner at Bates Wells & Braithwaite, on the legal aspects of merger.

Topics covered will include:

- overview of the policy environment
- reasons for thinking about merger
- stages in the merger process
- what helps to make a successful merger process
- the legal aspects of merger
- living through a merger, tales from the field.

Learning outcomes

The presenters' first-hand knowledge and experience of mergers will provide participants with a greater understanding and appreciation of the implications of merger. The session will also provide participants with potential strategies for the future which will enable them to make more informed and grounded choices if they decide that merger is the best option for their organisation.