

Nonprofit Sustainability Initiative
SAMPLE PRE-NEGOTIATIONS SURVEY (as of 1/31/17)

Important Instructions:

- This document is a guide before you complete the survey online. Do not submit this document.
 - Surveys must be completed by each NSI grantee partner, not just lead agency.
 - **SURVEYS MUST BE COMPLETED VIA SURVEYMONKEY AT:**
<https://www.surveymonkey.com/r/BYTXK56>
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1. What organization and leadership strengths will help you during your strategic partnership negotiation/exploration process? (open-ended)

 2. What challenges do you anticipate during the negotiations process, if any, and how will you overcome them (e.g. capacity, Board member buy-in, staff engagement)? (open-ended)

 3. How would you characterize the level of trust that exists between your organization and the organization you are considering as a potential partner? [CHOOSE 1]
 - High – there is a very high level of trust between our organizations.
 - Medium – for the most part, we have a trusting relationship. Just being cautious.
 - Low – we have some significant concerns regarding the level of trust between our organizations

 4. How would you describe the cultural “fit” between your organization and your potential partner? (Note that culture includes informal and formal elements such as values, rituals, routines, rewards, power structures, attitudes, assumptions) [CHOOSE 1]
 - Great - we have very similar cultures; an ideal cultural fit
 - Satisfactory - we have some cultural similarities and difference that will required effort to blend, but are confident it can be accomplished
 - Potential mismatch - we have very different cultures that will require significant effort to blend and could potentially disrupt the integration process

 5. How would you characterize your overall financial health: [CHOOSE 1]
 - We can comfortably fund all organizational operations and services, and we have a surplus to fund reserves.
 - We fund all organizational operations and services. We breakeven but would like to end with a surplus to build a reserve.
 - We have been able to fund our operations and services this year without making any cuts in expenses, and anticipate the same next year.
 - We are keeping our head above water for now.

- We will have a deficit this year and are not certain that we can make any further cuts in expenses without harming service delivery.
 - We are in significant financial trouble with multi-year deficits that make our future very uncertain
6. How would you describe your level of clarity on the following upcoming negotiation/ exploration elements (using a likert scale, from very unclear to very clear, with option for don't know)
- Strategic partnership options (e.g. merger, acquisition, joint programming, collaboration, administrative consolidation)
 - General negotiation timeline and activities
 - Negotiation deliverables to be provided by consultant
 - Resources (e.g. your time and money) required during negotiation process
7. What feedback, if any, do you have for the NSI funders for future efforts? (not required)
- a. What did you like? (open-ended)
 - b. What would you like to see be done differently? (open-ended)
8. To the best of your current knowledge, what are your initial goals for your potential strategic partnership? [We acknowledge that your goals are subject to change as you move through the negotiation process] [PLEASE SELECT UP TO 3]
- Programming: Expand programming – either the range/scope of programs offered, or the numbers served
 - Programming: Consider opportunities to expand our geographic scope; i.e. expand our programs into new communities/sites
 - Programming: We want to improve our outcomes – get better results for those we serve or otherwise increase our impact
 - Administrative: Reduce operating/administrative costs
 - Administrative: Develop or access higher level expertise (operating, administrative or programmatic)
 - Administrative: Improve our brand and reputation
 - Financial: Improve our financial health
 - Other – (please list)
9. How would you describe your experience of finding a consultant to facilitate your strategic partnership negotiation/experience? [CHOOSE 1]
- Very easy
 - Easy
 - Neutral
 - Difficult
 - Very difficult
10. NSI's long-term goal is for Los Angeles' nonprofit ecosystem to view strategic partnerships (any formal, long-term partnership, from jointly managed programs, shared administrative services to mergers and acquisitions) as tools to promote organizational efficiency, efficacy and sustainability. In your opinion, to what extent do the stakeholder

groups below agree that NSI has achieved its long term goal. (Answer options: Completely agree, somewhat agree, nether agree or disagree, somewhat disagree and completely disagree; don't know)

- Operational staff at your organization
- Senior leadership staff at your organization
- Board members at your organization
- Los Angeles funders, as a whole
- My industry, in general
- Los Angeles non-profit ecosystem, in general

