Integrate Your Organization

Say Goodbye to Silos; Be More Unified

by Shelli Bischoff

This article was originally published in 2011 under the title *From Coordination to Integration A Systems Change Approach to Organizational Alignment to Achieve Health Outcomes in Chronic Disease* and was based on extensive work completed with the Colorado Department of Public Health and Environment and with more than 20 states integrating chronic disease programs.

Since then, we have applied this systems approach to organizational integration in our work with local public health, healthy aging, human services, conservation, and natural resource organizations and agencies. In each case, integration has resulted in increased efficiency, optimal use of resources, and greater relevance. It has also enabled organizations to scale services across geographies or to each new, more diverse audiences.

Updated to reflect how integration can be applied to a variety of organizations, this article uses streamlined organizational language, outlines a more expedient process to accommodate current conditions, and includes examples to illustrate both the process and its impact.

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February 2021

Introduction

Organizational[1] integration is a systems-change process to achieve outcomes more efficiently and effectively. It is the opposite of fragmentation. In a fragmented organization, programs operate separately, or in silos, which tends to diminish the collective strength of the organization.

Moving from fragmentation to integration reframes how your work is done across units, programs, products, or services. It is particularly useful to address variable funding, increased service demands, or resource constraints. Integration also enhances job satisfaction and retention, improves client services, and fosters a stronger, more consistent brand throughout your community.

Organizational integration is more than coordination or restructuring. It is a deliberate and fundamental shift in how people think about their work, their communities, and their partners. Integration focuses on outcomes and results, rather than activities and processes. It optimizes human and financial resources and helps prioritize partners, projects, and target markets.

Purpose

For leaders interested in building a more focused and powerful organization to achieve organization-wide goals and attract funding and talent, this article presents a tested, step-by-step process based on the principles and practices of organizational development, public administration, and nonprofit

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[1] *Organization* means an administrative or functional structure, an arrangement or structure of common items. It is used in this article as a generic term implying the unit that is being integrated, which may be an agency, division, department, unit, nonprofit organization, or coalition.

management. The process has been successfully applied by organizations of different sizes and stages of development working at community, regional, and state-wide levels. It has been tested by government agencies, nonprofit organizations, and coalitions. While the process is sequential and comprehensive, it is not prescriptive and can be adapted and customized to fit your unique situation.

> "If you believe in the simple concept—that the way you organize your work makes all the difference in the world—there is an alternative to fragmentation. Rather than a series of discrete steps, work becomes an end-to-end continuum. People no longer focus entirely on their own jobs with no notion of how their work affects their colleagues' ability to do their jobs or even the customer. Instead, they are thinking about the whole and not the parts, about outcomes instead of activities, about the collective rather than the individual. What are now individual fiefdoms meld seamlessly into a unified structure with one goal: customer satisfaction." *Faster Cheaper Better: the 9 Levers for Transforming How Work Gets Done* (Hammer and Hershman, 2010)

Key Concepts

Integration Creates a Whole Greater Than the Sum of the Parts

Integration blends silos into a cohesive whole to optimize the organization's strengths and resources and to achieve organization-wide goals. This differs from coordinating across programs or creating cross-functional teams. An organization is either integrated, or it is not. Integration is a systems-change process; thus, it is a holistic approach.

Integration Shifts Mindsets

Integration requires leaving behind a territorial mindset (my staff/your staff; my funding/your funding) for a shared, collective identity and responsibility (our staff; our funding). integration asks individuals within the organization to expand their understanding of who their constituents[2] are and how the organization provides value to them.

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[2] We use constituent as a general term to refer to customers, clients, audiences, participants, donors, members, or supporters; those people that act on your behalf and are integral to your success.

Integration Requires Alignment

The organization must realign to support integration. Staffing, structure, systems, partnerships, structures, culture, and even values need to be reevaluated and updated within the new organizational context. Alignment is the most important step in creating an integrated organization.

The Integration Process

The integration process has three steps: the integrated plan, alignment, and change management.

The Integrated Plan

The first step in the integration process is the integrated plan, which derives from organization-wide, deliberate strategy and organization-wide goals.

For those accustomed to program or function-specific goals an integrated planning process is often the first time leadership defines goals, strategies, purpose, principles, or position comprehensively, considering the whole, rather than the parts.

While an integrated plan is not significantly different from a *good* strategic plan with organization-wide goals, the integration approach is an especially useful way to refresh and redefine relevance in a rapidly changing environment.

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Keys to Successful Integration

Prerequisites for successful integration include:

Leadership, the key to any effective change effort, must clearly articulate the vision of an integrated organization and steadfastly move the organization on that course. Leaders must also overcome obstacles to integration such as fragmented systems, restricted funding, and entrenched attitudes ("We've always done it this way!").

Management oversees the work of aligning the organization, guiding the creation of processes and policies that work for all, modeling and fostering an integrated mindset, and supporting, coaching, and supervising people through the change process.

Integrated Data provides leaders and managers with organization-wide information needed to make deliberate, data-based decisions. It also tells the story of the integrated organization and its impact.

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The integrated planning process is expedient and focused. Focus on the most pertinent data and information necessary for high-level strategic decision-making rather than depending on copious staff, board, and stakeholder opinions. Compiling and analyzing data across programs, using a holistic lens, is often an enlightening exercise in and of itself. Evaluating the *relationship* among data points can provide new insights or highlight gaps.

With integrated data and strategic decisions, leadership defines the foundational integrated strategy, the organization-wide purpose, impact, distinction, niche and value proposition, and goals. The next step is the objectives and tactics, an integrated work plan. The integrated work plan defines how the organization will collectively achieve goals. It is an interesting exercise for programs to work together to create cross-program objectives, this differs from the more typical fragmented approach of programs each developing their own set of objectives and tactics for each goal. The more collective, integrated planning process increases efficiency and potency and helps to uncover and reduce duplicative or conflicting efforts.

Alignment

An integrated plan is the first domino that sets off a chain reaction as systems, structures, human resources, resources, and culture adapts to support an integrated organization. The adaptation is an aligning exercise, ensuring all the pieces of an organization fit together seamlessly.

The tasks of alignment may include:

- Transitioning from program to project management
- Building and managing organization-wide data systems
- Redefining staff functions, allocation, and structure
- Revising strategic partnerships and relationships
- Updating board composition, roles, and structure
- Creating a budget and financial management system that reflects the integrated organization

Program to Project Management

Organizing work by project rather than program enhances cross-functionality, maintains a focus on outcomes, and eliminates redundancies. It also supports staff flexibility and professional development—two things that rank as high importance for staff retention and satisfaction.

Organization-Wide Data Systems

Access to reliable, timely organization-wide data (ideally housed in a single database) is needed to monitor progress towards organization-wide goals. Integrating data forces the organization to home in on the key performance indicators and often leads to the elimination of duplicative and siloed data.

> **Coordination doesn't equal integration**
> We have observed a tendency to create teams based on the integrated workplan and layer these teams on top of programmatic silos. While cross-program project teams can foster coordination, coordination is not integration. Adding teams while maintaining silos is a way to avoid systems change. Under the best of circumstances, the matrix approach (teams/silos) is a complex business model.
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> **Aligning doesn't equal restructuring**
> Aligning the organization is not synonymous with restructuring. And restructuring alone does not integrate an organization, nor is it always required to align it. When restructuring is a necessary part of the alignment process, it is the last step and must be preceded by defining responsibilities, performance expectations, projects, and leadership and management roles. Ideally, as the organization aligns organization-wide goals, the *right* structure emerges.

Staff Functions, Allocation, and Structure

Defining staff by function, rather than by program, better aligns individuals' skills and specializations with organization-wide goals and objectives. This ensures that unique skills can be allocated where most needed rather than being reserved only for the work within a particular programmatic silo.

Strategic Partnerships and Relationships

Organization-wide goals clarify which of an organization's dozens of partner and stakeholder relationships are the *most* necessary to achieving goals. Distinguishing between strategic partnerships and all others allows for the resources and capacity necessary for meaningful partnership engagement.

Board Composition, Roles, and Structure

In nonprofit organizations, aligning the board's role, composition, and structure with organization-wide goals streamlines efforts and increases engagement. In the public sector, where advisory boards are commonly organized around single issues, integration unifies diverse groups around shared goals and eliminate redundancies, better leverages resources, and is more respectful of key stakeholders' time (especially in smaller communities where the same individuals often serve on multiple boards or committees).

Budget and Financial Management Systems

Developing a comprehensive budget that reflects organization-wide revenues and expenses is critical for integration. While finances may still have to be managed and reported by funding source, an organization-wide integrated budget for a clear picture of the total of organizational resources, and a more integrated approach for resource allocation.

Change Management

Since integration is systems change at the organizational level, this is an exercise in change management. Successfully guiding the organization through integration requires strong leadership and effective communication. While integrating an organization can be complex and time-consuming, when managed well, it builds resilience.

Leadership's role is to ensure that everyone understands the need for change and how the change will take place. The need for constant, honest communication is paramount. The more clearly and consistently leaders communicate their intentions and expectations regarding integration, the more easily everyone adapts.

Even the best-led and managed integration effort can be overwhelming. The best practices of change management tell us to approach the process systematically. Define the first step, do the work, succeed, celebrate, and then move on to the second. Along the way, help others contribute to the effort in positive and appropriate ways so they can be part of those short-term wins.

Integrating helps an organization strengthen its ability to adapt to change. This resiliency is an important skill in our perpetually changing environment. Integration helps to define the clear, organization-wide focus and alignment for long-term resiliency.

Examples from the Field
State Public Health Agencies

Our integration work originated with state public health agencies across the country working to unite their chronic disease program silos, make better use of resources, and improve outcomes. Prior to integration, programs focused on specific chronic diseases (diabetes, heart disease, asthma, etc.), each with its own staff, overlapping partners and target populations, and largely similar, but separately executed, objectives.

The integration process helped agencies move beyond coordination to combine forces, capitalized on individual strengths, and eliminated duplication. The director of the West Virginia Division of Health Promotion and Chronic Disease said this of the integration work, "We have a solid platform for which programs and people could come and go (attrition) without causing capacity deficits, a clearer focus on who partners should be, focus on what is important to achieve health outcomes, a better sense of how we need to contract, and a good sense of what and where we need to be visible."

State Human Services Agency

A state agency was mandated to merge two programs to address the need for, "a strategic vision that will improve outcomes, recognize limited resources, break down silos, and promote self-direction and person-centered care." Processes were duplicative and clients received confusing and often conflicting information from the two programs. Between the two programs, there were dozens of plans and budgets, hundreds of partners, and nearly 40 special projects (all of which were deemed high priority!).

The integrated plan started with identifying shared, guiding principles, and creating an integrated leadership team. Team members from both programs agreed on shared outcomes, core functions, and a common language. Finally, restructuring to implement integrated strategies helped build a much more efficient, cohesive, and constituent-friendly operation. The now-singular team benefited from better communication and shared learning.

Local Land Trust

Integration is also a way for successful, effective organizations to leverage their strengths and expand impact. A strong, well-regarded land trust with an effective board and staff was operating in an area experiencing changing demographics. They used an integration process to ensure they remained relevant as their audience changed.

Organized by programs (land protection and stewardship) and function (marketing, communications, and fundraising), integration helped shift from programmatic to organization-wide goals. The subsequent process of aligning the organization led to updated programs and services, and a cohesive approach to reaching and engaging a broader base of constituents.

The process provided new opportunities for staff to learn from each other, work as a team, and be meaningfully engaged in the organization's work beyond the boundaries of their previously siloed programs. Many felt that they better understood and were able to better describe the full value and benefits of the organization.

Regional Environmental Organization

This large western regional organization could see the potential of breaking down silos to increase its ability to make an impact. However, creating a more integrated, unified organization was hampered

by a deep culture based on specialized expertise embodied in passionate staff working on their own (or small team) projects, decentralized over 11 states!

Given the staff's passion and shared commitment to the cause, the integration process started with an agreed-upon impact and a meaningful dialogue to update their long-time strategy. They easily recognized that internal systems and culture change were needed and that their work, regardless of geographic focus or topic focus, was related. By working more holistically, they could truly capitalize on each other's expertise for even greater organizational success.

For this organization, the shift from program (which reinforced the individualized culture) to projects (which they referred to as campaigns), was the focus of their alignment. Integration also helped the organization practice its core values and be more inclusive internally and externally. Most importantly, the change management strategy was ably orchestrated by the longtime director, who has a clear vision of the integrated organization, and a compelling and simple description of their winning strategy.

Conclusion

Regardless of the context or type of organization, integration results in more unified, cohesive, and efficient organizations internally, and more constituent-centered approaches externally. It unveils opportunities in partnerships and funding. As one public health leader said, "We are so ready for the new requests for proposals that it's scary!" Creating a more integrated organization is a comprehensive systems-change approach that leverages resources toward specific outcomes. It is a way to ensure a more efficient, effective, and efficacious operation.

The integration process outlined here has helped agencies and organizations focus on organization-wide goals, establish a clear and consistent identity, and better leverage scarce resources. A more integrated organization provides the foundation for resilience, success, and sustainability.

Shelli is the president and founder of Conservation Impact and Nonprofit Impact, client-centered practices of her mission-driven Company. The Company is dedicated to *radically impacting how organizations fulfill their missions and achieve results.* In her 35-year career, Shelli has consulted with more than 1,300 organizations in the United States, Canada, and the Philippines, representing a wide range of disciplines and missions including conservation, public health, community sustainability, education, and human services. Her strategic business planning, nonprofit marketing, and organizational development expertise ensure tangible results for all her clients.

In addition to her monograph on the *Integrated Strategy for Success and Sustainability,* Shelli has published articles on fundraising, nonprofit marketing, and organizational development. As a highly sought-after speaker and trainer, Shelli consistently receives the highest ratings for her energetic, interactive, and provocative sessions.

Before founding Conservation Impact and Nonprofit Impact Shelli developed technical assistance programs in federal agencies and nonprofit organizations. She started the Colorado Small Business Development Centers, created a million-dollar training institute at a local community college, and launched a revenue generating-operation for a Statewide youth organization. Over the years, she has served on a diverse array of economic development, civics, and human services boards.

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