

IMPLEMENTATION PLAN CHECKLIST FOR NEWSROOM MERGERS

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The primary purpose of this document is to help public broadcasters and independent newsroom operations identify and monitor the key activities involved in leading up to a formal merger agreement. It should be noted that the scope and the extent of the implementation plan might vary depending on the overall vision, size of the newsrooms, type of the organizations, legal structure, and the intended reach (local versus national or international).

DEPARTMENTAL ACTIVITIES:

ACCOUNTING & FINANCE

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
Accounting System		Review and determine the accounting system and create a plan to reconcile the accounts		
Check Signing Authority		Determine who will have the check signing authority		
Credit Card Issuance and Expenditure Policies		Determine who credit cards will be issued to and how they will be used		
Payroll Processing, and Timing		Reconcile any differences in payroll processing and timing for consistency		
Employee Expense Reimbursement		Review the reimbursement processes, decide on issuing checks versus using the payroll system		
Insurance		Review business insurance policies and contractual requirements, determine if any modifications to the policies are needed		
Charitable Registration Filings		Review the policies to determine the states where filings will be needed		
Foundation Grants		Determine the oversight procedure		
Financial Reporting		Determine process, timing, responsibilities, format etc.		
Account Classification		Decide upon departments/classes etc.		
Audit and Tax Returns		Determine process, timing, responsibilities, etc.		
Budgeting		Determine process, timing, responsibilities, etc.		
Forecasting		Determine process, timing, responsibilities, etc.		
Cash Management		Determine process and responsibilities, etc.		
Bank Deposits		Determine process, timing, responsibilities, etc.		
Bill Payment		Determine process, timing, responsibilities, etc.		

HUMAN RESOURCES

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
Benefits, Bonus Plans, and Retirement Plans		Review the plans, determine the changes to make them consistent throughout the merged organization		
Employee Handbook(s)		Create a new/ modify the existing employee handbook(s)		
Compensation Policies		Review the compensation policies. Determine if any salary adjustments and process modifications will be needed		
Job Descriptions		Draft new job descriptions, employment letters for those that will change organizations		
Forms		Prepare the forms needed to set up employees in the payroll system		
Org Chart		Identify new positions, compensation, create job descriptions, and job postings, determine preferred start date. Determine direct and dotted reporting lines.		
Performance Review		Review timing of last salary adjustments and reviews - update performance review process for any modifications decided upon to blend the culture of the merging organizations		
Employee HR Training		Prepare any HR training documents, visuals, or videos		

CONTENT

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
Editorial		Determine editorial roles, responsibilities, and workflow		
Organizational Roles		Determine how digital content team and on-air teams will work together, in conjunction with Tech department, social media and marketing to create content		
Existing Content		Evaluate the existing content, identify any weaknesses, areas for improvement and growth. Reevaluate contracts with existing journalists/editors/producers and negotiate contracts the reflect new programming goals		
New Content		Define and create a plan for new original local and regional (national) programming that can attract new audiences and generate new revenue.		

Talent		Evaluate existing talent, identify areas for growth, identify upcoming talent for digital content.		
Digital		Identify new original digital programming types and distribution channels		
Audience Engagement		Identify the ways to improve audience experience and interaction. Budget for the incremental costs		

DEVELOPMENT – MEMBERSHIP AND MAJOR GIVING

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
Development Team		Identify new positions, work with HR to create job descriptions, and job postings, conduct interviews, determine preferred start date. Determine direct and dotted reporting lines.		
Donor Database		Determine any modifications needed to CRM/Donor systems		
Processing Donations		Review membership giving levels, determine how/where donations will be processed, determine procedure to log checks, cash		
Pledge Drives		Determine new pledge drive dates, direct mail solicitation schedule		
Other fundraising activities		Evaluate the feasibility and potential of events, vehicle donation programs, or other fundraising activities		
Foundations		Review the historical sources of grant revenue, identify grant overlap, review the process of writing and managing grants, pursuing new grants		
Major Donor, Planned Giving, and Extraordinary Gifts		Create plans and timelines including staffing, approach, geographical focuses, program support being support. Determine additional donor analytics needed for donor data mining		

UNDERWRITING/ SALES

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
Underwriting Team		Identify new positions, work with HR to create job descriptions, and job postings, conduct interviews, determine preferred start date. Determine direct and dotted reporting lines.		
Underwriters/ Advertisers		Evaluate current advertiser opportunities on platforms including metadata and targeting		
		Create rules for and target lists for potential advertisers		
		Determine Underwriting rates and packages		
		Inventory management - on-air & streams		
		Inventory management - website & video		
		Evaluate OTT ad relationships		
		Reporting		
		Software review (Marketrion used by many public media groups)		

IT/ENGINEERING/ FACILITIES

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
Tech Evaluation-Landscape Assessment		Initial decisions about digital platforms & CMS going forward		
Digital Platforms		Evaluate current digital platforms for immediate synergies		
Content Workflows		Determine process, responsibilities, etc.		
External Platforms Content Distributed to (i.e. Roku)		Review and document		
Web hosting		Evaluate		
Staffing and Roles		Staffing - reorg current staff to reflect merged operations		
Software Systems		Create merged software list and identify overlaps, Resolve overlapping systems		
IT Contracts		List and review agreements with outside vendors supporting IT operations. Rationalize where appropriate		

Other IT Elements		Determine IT/copier/phone/email addresses/ rental cars/parking/facilities work orders needs and payment structure. Rationalize where appropriate		
Capital Expenditures		Identify and quantify future Capex spending - cameras/rental equipment		
Metadata		Metadata standardization (and expansion for advertising/reporting)		

MARKETING & COMMUNICATIONS

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
E-communications		Determine capability, build templates, merge email databases		
Marketing Plan		Create a marketing plan and budget		
Communications		Create public and internal communications plans, prepare communications materials		
Launch Events		Launch events to a targeted audience		
Website		Branding		

BOARD GOVERNANCE

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
By-laws		Draft, refine, and finalize the changes to the by-laws		
Board Members - Existing		Review and summarize existing board members, backgrounds, and responsibilities		
Board Members - New		Determine the total board size and composition, identify areas of expertise		
Board Terms		Review and decide on the changes to the terms, composition, size, and cultivation process		

SOCIAL MEDIA

Pre-Merger Assessment	Status of the Work	Notes and Activities during Pre-Merger	Who	When
Process		Review communications and content workflow for social media posts		
Branding		Secure relevant names		
Digital Ads		Create plans and budget for digital ad process		