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Building a Culture of Alignment in Institutional Mergers: Leadership First, Community Always

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P R E S I D E N T S
C O R N E R

Welcome to the May 2026 issue of The Phoenix Philanthropy Group's "Presidents Corner" e-newsletter. This month's topic, "Building a Culture of Alignment in Institutional Mergers: Leadership First, Community Always," explores the hardest and most enduring work of institutional mergers, creating a culture of alignment.

Dr. Devorah Lieberman, Senior Consultant for The Phoenix Philanthropy Group, was the first female president (serving 2011-2023) of the 135-year-old University of La Verne, a private not-for-profit university in Southern California. Under Devorah's visionary leadership, the University of La Verne was designated as a Hispanic/Minority Serving Institution, the endowment quadrupled from \$36 million to \$151 million, nearly \$175 million was raised, and over \$30 million was secured in corporate, foundation, and government funding. Dr. Lieberman is also senior advisor to the President of the American Council on Education, Consultant to the International Association of University Presidents, President-in-Residence at Harvard Graduate School of Education, and Workforce Initiative Lead for the LA Area Chamber of Commerce.

In a previous blog, I explored the structural and strategic dimensions of the ever-increasing number of higher education mergers and acquisitions, the financial realities, governance considerations, and the external forces that compel institutions to move toward an alignment model. Yet, as many institutional leaders and CEOs have discovered, while the technical aspect of a merger most often seems straightforward, the hardest work, the most enduring work, lies in creating a culture of alignment.

When two institutions align or merge, success is not determined solely by balance sheets, legal frameworks, or organizational charts. It is determined by whether a shared and trusting culture can be intentionally built, nurtured, revisited, adjusted when/if necessary, and, most importantly, sustained. Creating a culture

of alignment is not an outcome; I believe that it is a leadership obligation and responsibility.

Vision and Alignment Begin at the Top

Every successful institutional alignment begins with clarity, cohesion, and trust between and among leadership, specifically between both institutional presidents and their boards of trustees. Without this foundation, even the most promising partnerships will falter, and if they are not clearly communicated and addressed, they will likely fail.

Presidents and boards of both institutions must be aligned in vision and in values, communication style, and tolerance for risk. Equally important, boards must move beyond formal approval to genuine partnership. This requires:



- > **Shared purpose:** A clearly articulated “why” for the alignment that transcends financial necessity and speaks to vision, mission, students, employees, alumni, and societal impact.
- > **Unified messaging:** Presidents and board chairs must communicate (even over-communicate) consistently, frequently, and transparently, modeling trust and mutual respect. This honest communication starts with the boards and presidents and then with their respective constituents.
- > **Explicit agreements:** Early clarity around governance structures, decision-making authority, and leadership roles reduces ambiguity and prevents future conflict. Mutual and authentic trust must be established and reinforced throughout. Presidents of both institutions must feel and believe that they are equal partners in the future successes of the merged or aligned institutions and must treat each other as such. I cannot emphasize this enough.

Leadership alignment and trust is not a one-time achievement; it is an ongoing necessity and requirement. The rules of engagement, governance structure, and alignment expectations must be revisited regularly, and where there is perceived misalignment, the presidents must be ready partners in addressing this together. This partnership cannot be underemphasized. In the long run, it is the key to the successful merger.

From Leadership Alignment and Trust to Institutional Culture

Once leadership is aligned among presidents and boards, attention must turn to the broader institutional community. Culture does not cascade automatically—it must be cultivated deliberately and strategically.

Faculty, staff, alumni, and students experience mergers not only as strategic initiatives, but also as disruptions to identity, relationships, and routines. Leaders and boards stewarding the merger who recognize this human dimension, and address it as needed, are far more likely to succeed.



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To build a culture of alignment, the presidents and boards must:

- > Create spaces for connection, communication, trust, and respect
- > Honor and respect institutional histories
- > Develop shared language

As the presidents and boards move through the “merger journey” and beyond, these three elements should be addressed and re-addressed often so that the spaces, histories, and language are always front and center in all narratives. Keep in mind, they cannot be addressed often enough.

Engage the Most Loyal First

In times of transition, leaders often focus on skeptics. Yet the most powerful agents of alignment are frequently the most loyal employees and followers.

These individuals carry institutional memory, influence peer networks, and shape how others interpret change. When engaged early and authentically, they become translators and champions of the new culture.

Presidents and boards should respectfully engage and encourage the most loyal to become part of the future alignment. I often use the phrase, “water the flowers, not the rocks.” In this case, your loyal employees and followers are your followers. They are the flowers in the garden that you are co-creating with the merging institutions.

When Alignment Fails: Lessons from Mergers That Fell Apart

While higher education often prefers to highlight successful partnerships, there is equal, if not greater, value in examining those that faltered or failed. Across sectors, including higher education and adjacent not-for-profit or mission-driven organizations, a consistent pattern emerges. Mergers fail less often because of

flawed strategy and more often because of cultural misalignment, as I have previously described.

Consider the widely discussed collapse of the proposed alignment between The University of Akron School of Law and Cleveland State University College of Law which began in 2020 and ended by 2022. Both had declining enrollment and envisioned creating a regional law school. They saw these aligned law schools sharing resources and services and still run by separate institutions. It appears that the alignment ultimately failed, in large part, because of an inability to co-create a culture that honored the respective institution’s histories, traditions, and identities.

The takeaway for presidents and boards is clear: alignment cannot be assumed. It must be actively constructed—and continually reinforced.

Flags for Presidents and Boards That the Culture of Alignment Is Not Taking Hold

Even well-planned mergers can begin to drift off course. The most effective presidents and boards are those who recognize early warning signs and intervene before misalignment becomes entrenched and boards begin to question whether the merger/alignment was a wise route.

Watch for these signals:

- > **Persistent “us vs. them” language**
When faculty or staff continue to identify primarily with their legacy institution, it signals that a shared identity has not yet formed.
- > **When presidents feel they no longer have any autonomy or independent authority**
When presidents of the aligned institutions begin



to believe that either they have unequal authority (one feels they have more authority than the other), the “we vs they” behavior becomes inevitable, and the boards usually choose to support their respective president.

- > **Parallel decision-making structures**
If units continue operating independently rather than collaboratively, alignment exists on paper but not in practice.
- > **Information asymmetry and rumor proliferation**
When communication is uneven or unclear, informal networks fill the gap—often with misinformation. Some call this the “street committee.” The informal conversations carry more weight and reliability than the official committees or positions.
- > **Disengagement of high-trust employees and board members**
When long-tenured or highly respected individuals withdraw, it is often an early indicator of cultural erosion.
- > **Competing priorities and resource tensions**
If resource allocation decisions consistently favor one legacy institution over another without clear rationale, trust deteriorates quickly. And, when the president of the “favored” institution begins to wield power and authority over the other, tensions increase.
- > **Leadership misalignment becoming visible**
Differences between presidents, cabinet members, or boards—especially when played out publicly—signal deeper fractures.





These are not simply operational issues; they are cultural and lack-of-trust indicators. Left unaddressed, they can undermine even the most promising alignment.

Practical Strategies for Successful Alignment

Several strategies consistently emerge as critical:

- > Co-create a shared vision
- > Communicate (over-communicate) relentlessly
- > Keep the focus on establishing authentic and honest trust between presidents and boards
- > Align incentives and structures
- > Invest in relationship-building
- > Be patient and persistent

A Leadership Imperative

Institutional alignment is not simply about combining resources; it is about reimagining what is possible together.

As I noted in my earlier reflections on mergers and acquisitions, clarity, governance, and strategy are essential. But they, alone, are not sufficient. Culture and trust determine whether those strategies endure.

The most successful mergers are those in which leaders move beyond integration to inspiration, where individuals see themselves not as part of a transaction, but as contributors to a shared trusting co-institutional future.

That future begins with leadership alignment, grows through relationships, and is sustained by a culture that is deliberately, thoughtfully, and collectively built.



Dr. Devorah Lieberman joined The Phoenix Philanthropy Group as a senior consultant. She also serves as senior advisor to the president of the American Council on Education, consultant to the International Association of University Presidents, executive coach to institutional presidents and others who aspire to be presidents, and sits on multiple for-profit and not-for-profit Boards.
