Mergers & Acquisitions Checklist:
Building Bigger — and Better — Health Centers

KEY STRATEGIC QUESTIONS TO ASSESS EARLY INCLUDE:

- [ ] Does the partnership advance mission fulfillment?
- [ ] Will it expand access to care in underserved communities?
- [ ] Can it be supported without straining people, systems, or finances?

THIS INITIAL ASSESSMENT SHOULD INCLUDE A CLEAR UNDERSTANDING OF EACH ORGANIZATION'S:

- [ ] Service mix and payer environment
- [ ] Patient demographics and community needs
- [ ] Workforce structure and staffing capacity
- [ ] Technology platforms and EHR systems

EARLY CLARITY AROUND GOVERNANCE IS CRITICAL. UNRESOLVED GOVERNANCE ISSUES ARE ONE OF THE MOST COMMON CAUSES OF MERGER CHALLENGES AND FAILURES. LEADERSHIP SHOULD ESTABLISH EXPECTATIONS UPFRONT AROUND:

- [ ] Board composition and oversight responsibilities
- [ ] Decision-making authority and governance structure
- [ ] Executive leadership roles and reporting relationships
- [ ] The future role of each CEO in the combined organization

EQUALLY IMPORTANT IS A RIGOROUS OPERATIONAL AND COMPLIANCE DUE DILIGENCE PROCESS. HEALTH CENTERS NEED A COMPREHENSIVE VIEW OF EACH PARTNER'S RISK PROFILE AND READINESS, INCLUDING:

- [ ] HRSA compliance status and open findings
- [ ] Financial health and revenue stability
- [ ] FTCA coverage and risk management processes
- [ ] Quality performance metrics and improvement initiatives
- [ ] Any existing Corrective Action Plans (CAPs)

OPERATIONAL DUE DILIGENCE SHOULD ALSO EVALUATE:

- [ ] Facilities and lease agreements
- [ ] Provider credentialing and productivity benchmarks
- [ ] EHR compatibility and data integration needs
- [ ] The true cost and effort required to integrate teams and systems

CURIS
info@curis-consulting.com