**Step one: Assess current realities in both organizations\***

Compare mission statements

Compare cultures, histories, and values of each organization

Compare strengths, successes, and causes for optimism within each organization

Compare challenges, setbacks, and causes for pessimism within each organization

Compare financial health and stability of both organizations

Compare members’ operational similarities and differences, e.g. products, revenue models, staffing and leadership

Compare members’ needs, wants, and expectations for their respective association memberships

Compare structure, resources, and existing talent in association offices

*\*may require gathering information and verifying assumptions about both organizations*

**Step two: Imagine merged/partnered organizations; identify costs, benefits, and risks**

Define potential for acceleration or deceleration of each organization’s mission/goals/purposes

List anticipated advantages and disadvantages for both organizations’ members

Describe expected impact on association management in both organizations, i.e. changes in services, infrastructure, leadership and staffing of association offices

Identify key benefits and risks for both organizations’ efficiency, effectiveness, and viability

Envision strategies to maximize benefits and minimize risks for both organizations

**Step three: Reach consensus and recommend action**

Agree on value of benefits and manageability of risks; do benefits clearly outweigh risks?

Recommend affirmative or negative action to board, accompanied by lists of expected benefits, identified risks, and strategies to maximize benefits and minimize risks

If affirmative action is recommended, list needs for further exploration and resolution by boards and/or executive staff, e.g. merger vs partnership, executive leadership and staffing of association offices, naming of newly formed organization, etc.  Name any issues the AAN board should consider as non-negotiable as the relationship gets defined.