

# Steps in Considering a Merger

## Explore

Determine reasons to consider a merger.  
Clarify the benefits of a possible merger to your organization.

## Identify

Find a prospective partner who can also benefit from a merger.  
Select an ad hoc group to represent your organization in discussions.

## Plan

Schedule a time to discuss a possible merger with the potential partner.  
Decide whether a facilitator will help the process.

## Meet

Identify the pros and cons of a potential merger for both groups.  
Create a record of the discussion to share with the respective boards.

## Propose

Create a recommendation to the board, with full rationale.  
Allow adequate time for a full and complete board discussion.

## Vote

Make sure an opportunity for input from all board members is provided.  
Vote on whether to proceed; allow each voting member to state a rationale.

## Share

Create a plan to share results with stakeholders.  
Communicate key messages over and over again.