



Association Consolidations

Overview

There are often compelling business reasons for Associations to consider joining forces with other Associations to create not just a larger entity, but also a more effective one for the members. But many times consolidation is not possible due to several challenges: lack of an objective approach, confidentiality concerns, protectionist attitudes, egos, career threats, and the absence of professional assistance with the process.

Unify™ is a program that offers an experienced, impartial, and trusted facilitator to overcome these issues and positively move the consolidation debate and process. As a comprehensive approach, Unify includes five steps: Synergy Workshop, Design Retreat, Research, Implementation, and Continuing Consulting.

Synergy Workshop

This workshop is a presentation and discussion on different structures and methods to combine strengths of separate Associations. Included are the five consolidation models, key issues, and history. Developed from actual events, the presentation covers emerging concepts in this changed environment, and includes recent examples. It provides a base of understanding possible directions and next steps in the process.

Research

Prior to the design session, participants are interviewed to clarify the major issues and to understand their levels of concern. As trends unfold, there may be follow-up calls or surveys. Relevant organizational documents are

reviewed. This research forges an understanding of the degree of common direction and assists in setting the agenda for the key items.

Design Retreat: VIP

This interactive retreat creates the new organization in three steps: Vision, Issues, and Plan (VIP). The vision step confirms there is a common viewpoint on the type of entity to be formed. A common vision is not only necessary to proceed; it is also very useful in making critical decisions later. A vision becomes the philosophical base for direction.

The next step is to clearly identify the issues that must be resolved to create the new organization. These vary with the organizations, but revolve around structure, assets, program mix, etc. There are also “silent” issues that must be forced to the table for discussion.

The last step is to craft solutions into a plan that works for all Associations. The actions must be specific enough to solve the issue, but leave some flexibility for implementation. Many groups approach merger with this step only, but fail because the foundation is not set.

Implementation

This implementation phase consists of sessions with the group and task teams that complete the details of the consolidation plan. Work is based on prior decisions, as well as issues raised during the process. It includes addressing the approval process and formal documents. Depending on the structure, it could include outside professional review of specific items.

Continuing Consultation

After approval and implementation is underway, there are natural issues that affect the progress. Consulting advice is available to assist in decisions and changes. This is normally through distance communications.

A description of the five steps of Unify:

Synergy Workshop

A half-day session with leaders and AEs on challenges, opportunities and attitudes on consolidation. Covers models and choices of process.

Research

A confidential interview with participants prior to the retreat. Depending on size, could be combined with electronic survey and follow-up calls. Review of organizational documents.

Design Retreat: VIP

A two-day retreat with the consolidation group leaders to create a vision, identify critical issues, and develop solutions. A plan is the result.

Implementation Sessions

Two days of sessions on subject areas in the plan, and specific actions to take. Includes confidential sessions as needed with AEs, leaders, or outside professionals.

Continuing Consultation

Advise on continuing implementation of the plan. Includes one year of consulting by electronic communications or on-site with the implementation group.

The Facilitator

Jerry Matthews was the CEO of the Illinois and the Florida Association of REALTORS® for 27 years, and during that time assisted with numerous mergers. For seven years he has been an industry advisor and speaker on strategic trends and organizational change. In 2010 Jerry created the Unify™ Program to formalize the consolidation process for REALTOR® Associations, which has been supported by NAR.

Two Inman articles about Jerry's merger facilitation activities for NAR:

<http://jerrymatthews.com/docs/MergerMan.pdf>

<http://jerrymatthews.com/docs/MergersNotEasy.pdf>

And a recent article in AE Magazine about successful mergers:

<http://jerrymatthews.com/docs/SuccessfulMergers.pdf>

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