

Merger and Alliance Toolkit

1. Getting Ready: Assessment

1.3d Concerns Worksheet

Autonomy

Ask members of the board, staff, and management team to describe the fears and concerns they have about loss of autonomy for the organization, its programs, or its people. Discuss each issue thoroughly, attempting to clarify misunderstandings, create compromises, and articulate the advantages to be gained in exchange for a lesser degree of autonomy. The chart below can be recreated on a flip chart for group use.

Fear or Concern	Response or Compensating Gain from Merger

Self-Interest

Ask members of the board, staff, and management team to answer the following questions:

- In what ways are your personal interests threatened by this partnership?
- What would help you to feel less threatened and more secure in moving forward?

As a group, complete the left-hand column below, including the initials of any individual who is affected by a particular concern. Then return to the right-hand column and try to discover what steps the organization could take to provide reassurance or clarification of each person's concern.

Who	Fear or Concern	Reassurance or Clarification Sought