



Fraternal mergers: First steps to strategic success

National Fraternal Congress of
America

123rd Annual Meeting

19 September 2009

Today re fraternal mergers

- 1. Key considerations to strategic success**
2. Together, discuss collaboration

Key considerations to strategic success

- : Acknowledge EVERY fraternal has the same
 - 2 primary goals
 - 4 related tactics

Key considerations to strategic success

- : Why collaborate
- : How much do you want to collaborate
- : Who is being impacted
- : What are you now
- : Tell your story
- : Check-in

Key considerations to strategic success

- : EVERY fraternal has the same 2 primary goals
 - Be a great insurer
 - Be a great volunteer association
- : Financial side easy – math
- : Fraternal side tougher – emotional
- : Checking-in w/ members is so important
- : 3rd party: NFCA / outside consultants or fraternalists

Key considerations to strategic success

- : Process can be positive
- : Keep focus on member engagement
- : Healthy diversion

Today re fraternal mergers

1. Key considerations to strategic success

2. Together, discuss collaboration

- Get past the “math”
- Focus on fraternalism

Together, discuss collaboration

- : In small groups, discuss:
 - **Viability** of “mergers” for fraternalism
 - Potential **obstacles** moving forward
 - **Impact** on members and fraternalism

Together, discuss collaboration

1. VIABILITY OF MERGERS FOR FRATERNALS

“Merger” redefined as:

- : Ways we can capitalize on each other’s strengths, and in so doing, become (completely/partially) better together than separate — not an “all or nothing” mandate.
- : Areas where we can best collaborate for the greater good.

Together, discuss collaboration

2. OBSTACLES IN MOVING FORWARD

- : What resources/support do we need to openly discuss merging all or some of what we do?
- : What do we need to have in place to be able to take this first step?

Together, discuss collaboration

3. POTENTIAL IMPACT—POSITIVE AND NEGATIVE

- :** How will mergers impact our...
 - members?
 - fraternal objectives?
 - benevolent activities?

Together, discuss collaboration

PLEASE...

- : Yellow dot on the back of your chair
- : Move to the table where the number matches the number on your dot
- : Note taker
- : Spokesperson
- : 20 minutes – refer to handout (middle)
- : Collect your thoughts

Together, discuss collaboration

WHAT DID YOU COME UP WITH?

- **Viability** of “mergers” for fraternalists
- Potential **obstacles** moving forward
- **Impact** on members and fraternalism

Thank you!

Please complete the evaluation form.

Any questions?

We can help

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