

AOU and COS Agree to Pursue Merger

AOU and COS Members,

The AOU Council and the COS Board met together in July at our annual meeting in Norman, Oklahoma to review the progress and success of our partnerships: the joint publication of our journals, joint communications and website (www.americanornithology.org), our joint Science Arbitration initiative, and our joint meetings. During this meeting, one board member posed the question, "shouldn't we merge?" The members of each governing board of COS and AOU discussed this proposal at great length and the many potential benefits with great enthusiasm. The Council and Board jointly and unanimously approved moving ahead to study the possibility of a merger. This development was announced and discussed at the AOU Fellows meeting and the COS business meeting in Oklahoma.

Over the coming months, COS and AOU members will receive communications soliciting your input. Initially, leadership wants to hear both what excites you and what concerns you about the idea of merging the two organizations. Once we've collected your feedback, leadership will work to resolve identified concerns. We will then communicate our proposed solutions to these concerns and solicit member reactions. By late fall we hope to finish gathering input and reactions, and to finalize a recommendation to AOU Council and COS Board - either to merge (and if so what a merger would entail) or to remain separate.

If the governing boards of the two societies agree on a solid proposal for merger, the final step will be a vote by membership. The Cooper Ornithological Society bylaws and the State of California, where COS is incorporated, call for a vote by the COS membership. The AOU bylaws require that the AOU Fellows vote on an issue of this magnitude. Although the AOU bylaws do not require a vote of the general membership, Council would nevertheless like to conduct such a vote, to inform the voting of the AOU Fellows.

Our goal is to conduct the vote this winter so that we can proceed quickly – either to merge, or to work independently but continuing our joint ventures in meetings, publications, website, and science arbitration.

To jumpstart the discussion, here are some of the suggested reasons why a merger might be in the best interest of the membership of both organizations:

1. **Lower dues for individuals.** Members of both organizations would pay one membership fee, not two, to the merged organization.
2. **Increased resources to support members at all stages of their careers.** By combining programs and leadership efforts, a single organization would be in a better position to offer quality mentoring and development activities for students, early career professionals, teachers, mid-career professionals and retirees at annual meetings, more research and travel grants, recognition awards, editorial support for Latin American authors and online resources for

teaching, research and outreach. All members would have access to The Auk: Ornithological Advances, The Condor: Ornithological Applications and The Birds of North America. In a merged organization, fewer resources would be applied to administrative and operating expenses by combining functions, leaving more resources to be applied to ornithology (Note that finances of a merged organization are being evaluated by a subcommittee at this time).

3. **Greater agility in publishing.** A primary function of our societies is to produce journals that provide high quality science to aid authors, scientists, agencies, and the public. Journal publishing is changing rapidly and evolution of the digital platforms, rapid online availability, open access, archive access, print-on-demand, etc, are needed to continue to enhance the visibility, impact and usability of the journals, and these possibilities will be strongly facilitated by the increased resources of a merged society. In a merged organization, strategic decisions would be more streamlined than the current situation with two societies.
4. **Increased likelihood of success in fundraising.** The act of merging the two societies would be a significant statement to potential funders of our commitment to and vision for the future of ornithology.

Since we met in Oklahoma, a small team of AOU representatives (Steve Beissinger, Scott Lanyon and Melinda Pruett Jones) and COS representatives (Martin Raphael, Kim Sullivan, Tom Martin, and Blair Wolf) has been discussing the merger concept and a preliminary set of issues raised by leadership and members of AOU and COS. Those issues and their tentative resolution are described in the following table.

Category	Issue	Proposed Resolution
Organizational Merger	How will the merger happen functionally?	We propose that COS would merge into AOU and the new combined organization would have revised bylaws and potentially a new name.
Mission	As an organization, AOU is interested in the global avifauna and ornithologists primarily of the Western Hemisphere. Would a merger of COS with AOU result in a loss of focus on the avifauna of North America?	We propose that the merged organization have as its focus the global avifauna and ornithologists primarily of the Western Hemisphere.
Organizational Structure	Following merger, how should Bylaws change?	Necessary bylaws changes will become apparent as we make more decisions.
Organizational Structure	Following merger, will Elective member and Fellow categories of AOU continue and would Honorary members of COS continue?	We believe that all of these membership categories have the potential to be very important in professional development but this potential is realized only if they are well implemented (i.e., deserving ornithologists are recognized). Implementing these categories effectively and strategically must be a priority and will require the development of a well- functioning member database.

Organizational Structure	Following merger, will there be limitations on who can be elected as an officer or as member of the governing body?	To be determined.
Organizational Structure	Following merger, who will vote on bylaws changes and other decisions?	To be determined.
Organizational Structure	Will there be fewer total leadership positions?	There will probably be fewer individuals elected to leadership positions, but leadership opportunities are by no means restricted to elected positions as we anticipate extensive committee membership and work.
Organizational Structure	What will be the name of the merged organization?	To be determined.
Finance	What does the first year post-merger budget look like?	Currently under discussion by an ad hoc AOU/COS finance working group.
Finance	Will budgets for existing programs have to be cut or the annual endowment draw of either organization increased as a result of a merger?	Currently under discussion by an ad hoc AOU/COS finance working group.
Finance	Following merger, how will we manage the transfer of assets including fate of invested funds?	To be determined.
History	Following merger, how do we retain identities, history, and traditions?	We propose that existing awards be retained, but renamed by adding the name of the originating organization. We also suggest setting up portions of the web site to celebrate the history of the organizations and maintain organizational archives.
Membership	Following merger, what happens to people with lifetime memberships (COS, AOU, or both)?	We propose that all continue to be lifetime members of the organization going forward.
Membership	Following merger, will all members have online access to BNA?	We propose that members of the merged organization have access to BNA.
Membership	Following merger, what will the new annual dues be?	To be determined.
Committees	Following merger, what happens to AOU and COS committees?	We'll look at a matrix of committees and their charges. We propose that where we have duplicate committees, we merge them. All other committees will be retained in the merged organization at least to start.
Communications	Following merger, what happens to the AO.org website?	We propose simplifying the website structure (removal of the dual organization format). Further, we propose that we use the web site to explicitly, and very visibly, acknowledge the two society's histories.
Publications	What changes will happen to COPO?	Few changes to its operations are anticipated. Following merger, COPO's programmatic income

		and expenses will be managed as part of the merged organization (much more efficient and logical than the current situation).
Publications	What happens to the Auk?	No change.
Publications	What happens to the Condor?	No change.
Publications	What happens to Avian Studies?	No change.
Meetings	Historically, COS held small annual meetings in the west. Will a COS merger with AOU reduce the opportunity for west coast ornithologists to participate in meetings?	We anticipate that the merged organization would continue to have an annual meeting, very similar to the joint meetings that AOU and COS have had for the last few years. Locations would vary, and selected based on desirability of destination and value-for-dollar.
Partnerships	Following merger, what will be the relationship of the organization with OSNA?	To be determined.
Partnerships	Following merger, what will be the relationship of the organization with Ornithological Council?	To be determined.

Now is a good time for us to receive your input. Are we addressing your concerns in the issues and resolutions identified above? What excites you and what concerns you about the prospect of a merger? Just as importantly, what are the great things about each society that you would want leadership to be sure to preserve in a merged organization? We ask that you respond to the [President of the AOU](#) and/or the [President of COS](#) (addresses are below) by email, a phone call, or letter by Oct. 19, 2015.

We expect this to be the first of several opportunities for the memberships of both societies to participate in the process underway. Our next steps include analysis of the financial impact of a possible merger, and continued discussions by representatives of both societies to resolve the remaining issues identified in the table above and others that may arise. We expect to communicate our findings again to membership by late-November.

Sincerely,



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