

Amalgamation Checklist

Checklist	Comment
Why is your organisation thinking about amalgamating with another organisation?	
Are the purposes of the organisation you are thinking of merging with the same as the purposes of your organisation?	
Governance and Culture	
Will your organisation's governance structure align well with the other organisation?	
Will your organisation's culture align well with the other organisation?	
Does your organisation have a current constitution or set of rules and does it allow you to amalgamate with another organisation?	
Do you have a mechanism for allowing your members to be engaged in any decision to amalgamate?	
Have you considered how an amalgamation or merger might impact on your current governance structure, incorporation and constitution?	
Will your organisation need to develop a new constitution or set of rules?	
Assets and Financials	
What is your current financial status and how will an amalgamation impact on that?	
Is your financial status in jeopardy and likely to create any issues when amalgamating?	
Will any grant funding you receive be jeopardised by an amalgamation?	
Will any sponsorship you receive be jeopardised by an amalgamation?	
What assets does each organisation have that need to be considered?	
Does either organisation have any loans or mortgages and how will they be impacted by an amalgamation?	
How will your current financial records be impacted, such as current bank accounts, GST, tax concessions, wages, fringe benefits etc?	
Does your organisation have a liquor and/or gaming licence and how will that be impacted by an amalgamation?	
Does your organisation understand that with any amalgamation all assets, finances etc will be transferred to the new entity?	

Property	
Will your organisation stay in its current facility or move to new premises?	
If a move is required to, another facility how will the current lease/licence arrangement be addressed?	
Will you need to seek landlord permission/ approval to amalgamate?	
Marketing and Communication	
Will there be a need to create a new name, logo and uniform and how will members react to this?	
How will the members be involved in any decisions re these changes?	
What will happen to any existing websites, email addresses or Facebook sites?	
Does each organisation have a consistent set of policies and procedures regarding their operations and conduct of activities?	
General	
Will your organisation share personal and sensitive club information/documentation with another organisation and if so how will it be used?	