



**Stage 1: Review**      **Stage 2: Plan**      **Stage 3: Mobilise**      **Stage 4: Implement**

Prepare to amalgamate by establishing a project management framework & documenting the 'current state'.

Plan the amalgamation by analysing, consolidating and integrating 'current state' data, to inform decision-making & development of key plans & strategies.

Focus moves from preparation to implementation; primary focus is on finalising interim & new arrangements for amalgamated entity.

New entity commences operation on Commencement Day. Implementation may continue for 3-5 years.

**Key Milestones – Stage 1**

- Project management framework established.
- Overarching Transition Action Plan developed.
- Communication plan (internal & external) developed.
- Framework or system in place for transition-related expenditure.
- Specialist/functional project teams established.
- Inventory of 'current state' (i.e. systems, processes, frameworks, policies, databases and plans) in each existing council collated & documented.
- Commence development of Change Management Plan.
- Commence due diligence review.

**Key Milestones – Stage 2**

- Jointly agreed revised project framework & transition plan.
- Principles and values for change endorsed.
- 'Current state' information/data analysed, consolidated & integrated. (e.g. processes, plans and policies into consolidated documents.)
- Services & service delivery models reviewed.
- Interim Organisational Structure developed (includes review of new entity & staffing structures reviewed).
- Prepare Commencement Day Plan/checklist.
- Risk information is shared and compared.
- Due diligence report finalised.

*NOTE: The Milestones listed here across all stages are high level indicative only. Users should refer to the detailed actions in the Amalgamation Toolkit.*

**Key Milestones – Stage 3\***

- Policies and Delegations consolidated.
- Staff transmittal, recruitment and redeployment processes finalised.
- Operational Plan 2016/2017 finalised.
- Pre-Commencement Day activities implemented (refer Commencement Day checklist).
- Interim service Delivery Model.
- Outstanding compliance and audit issues addressed.
- Risk management policy endorsed for new entity.
- Business systems scoped & procurement options analysed.

**Key Milestones – Stage 4\***

- Appointment of interim GM.
- Commencement Day plan activated.
- New & interim policies & standards implemented.
- Compliance & audit framework, new reporting requirements & delegations in place.
- Commence integration of business systems (e.g. finance, HR, payroll, asset management, property & rating, records management, budgeting, reporting.)

*\* NOTE: Milestones could change, pending details of the proclamation.*