



Merger/Acquisition Tip Sheet

COA has created a tip sheet for organisations that have recently merged with, acquired, or have been acquired by another organisation. We recognise that mergers/acquisitions can maximize the strength of an organisation by diversifying services, stabilising finances, and increasing human resources. At the same time, we understand the problems a merger/acquisition can create for an organisation’s infrastructure. As a result, we have identified some organisational operations and areas within our standards that may assist organisations during this time of change.

The following is a list of organisational operations that should be addressed during a merger/acquisition:

- ☛ Integrating governing bodies
- ☛ Ensuring financial stability
- ☛ Recruiting and retaining qualified staff
- ☛ Monitoring the organisation’s foreseeable risks
- ☛ Reviewing the facilities of both entities

The following is a list of standards that should be reviewed during a merger/acquisition:

CA-ETH 1 Transparent Operations	CA-GOV 6 Leadership Responsibilities
CA-ETH 2 Conflict of Interest	CP-AM 5 Agency Oversight and Community Representation
CA-ETH 5 Professional Conduct	CP-AM 6 Organisation of the Agency’s Administration Team
CA-FIN 1 Governing Bodies Responsibilities	CP-AM 7 Administration Responsibilities
CA-FIN 2 Internal Control Environment	CA-HR 1 Work Environment
CP-FIN 1 Internal Control Environment	CA-HR 3 Retention and Satisfaction
CA-FIN 3 Financial Risk Assessment	CA-PQI 1 Leadership Endorsement of Quality Performance Values
CP-FIN2 Financial Risk Assessment	CA-PQI 6 Staff Training and Support
CA-FIN 4 Stable Predictable Revenue	CA-RPM 1 Legal and Regulatory Compliance
CA-FIN 5 Financial Planning	CA-RPM 2 Risk and Prevention
CP-FIN3 Financial Planning	CA-RPM 4 Insurance Protection
CA-GOV 3 Mission	CA-RPM 9 Contracts and Service Agreements
CA-GOV 4 Community Involvement and Advocacy	CA-ASE 2 Accessibility
CA-GOV 5 Organisation of Governing Body	CA-ASE 3 Legal and Regulatory Compliance

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