Mergers, Alliances and other ways of joining up.
An ABC Approach

The following have contributed to the production of this document along with a case study template, completed case studies, literature review and reading list.

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The ABC document is intended as guidance only and is not "how to do a merger". We have used our own experiences to develop an alphabet tips and techniques guide

We would encourage all users to contribute to the growing bank of knowledge in this area by submitting their own case studies

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Letter	Meaning	Detail	Example
A	Advantages	Focus on the advantages and positives that the merger might bring.	Increased resources; Greater skill mix within the team; Opportunity to create new services, or extend existing services
	Assumptions	Don't assume things about the process(outlook/procedures/philosophy) Check and ask things first.	
	Actions List	Very important to keep up to date.	Have version control on everything especially where documents are in use by many people making changes to them

B

Letter	Meaning	Detail	Example
B	Branding	One unified brand or retain own identity	You might want to rename your services as one.
	Build Relationships	Do it early with your counterpart – find out who they are. If feasible meet up for a coffee. Keep in regular contact with your counterpart.	These could include IT, Medical Director, Nursing Director, HR, Finance, champions
		Be open and if possible brief all staff together.	Network with your peers
		Use existing networks / contacts	Facilities/Estates – if moving libraries or stock
		Identify key contacts in each organisation.	
	Business Case	Will you be required to write a business case? If so, do you require any support?	http://kfh.libraryservices.nhs.uk/high- profile-health-libraries/making-the- case-advocacy/building-a-business- case

Budget	Consider whether the budgets will be merged or remain separate.	
	Identify any potential issues with the budget.	
	May be seen as a way of saving money by the organisation	
	Be realistic in expectations of budget setting	

## C

Letter	Meaning	Detail	Example
C	Contacts	Identify stakeholders e.g. own staff, counterpart, users, HEE, IT Have honest conversations A new organisation creates a temporary period when everyone's keen to make new contacts and get to know new people. This can create an opportunity to introduce the library to key stakeholders and get their views on what would be useful  Have something prepared – what would you say to the new Chief Executive if you bumped into them.	

#### D

Letter	Meaning	Detail	Example
D	Documents	A merger or collaborative piece of work may generate a number of documents.  Consider who will be responsible for keeping them up to date. And who will have access to them.  Where will they be stored?  Does your organisation have templates	Examples of documents that might be required include:  Action Plan Business Case Communications Plan Minutes of meetings Vision  Web based software e.g. Trello
		that you can use?  Do you need to refer to any existing organisational policies or guidance	Records Management Policy, Information Governance

## E

Letter	Meaning	Detail	Example
E	Expectations	Manage expectations of your own team, the organisation, your users partner organisations and stakeholders  Understand the expectations of the organisation.  Understand the expectations of the organisation.  Remember people can find change hard.	Involve your teams as much as possible accepting that they are stakeholders in the outcome. Everyone has an opinion and whilst some views will have no validity allowing people to express their views can be sufficient to make them feel engaged with the process.
	Engagement	See also communication	

### F

Letter	Meaning	Detail	Example
F	Finish Line	Remember people can find change hard.  Focus on completion  What will the service look like – merger, closure, collaboration, partnership.  What staff do you need.	Where only one organisation subscribes to a resource which you wish to retain. And the pricing is based on clinical whole time equivalents. This may increase the cost of the resource and you mad need additional funding
	Flexibility	Be prepared to compromise but be clear on non negotiable areas.	
	Funding bid	This is a chance to be clear about any extra funding you need and the consequences of not having it.	http://kfh.libraryservices.nhs.uk/high-profile-health-libraries/making-the-case-advocacy/building-a-business-case/

## G

Letter	Meaning	Detail	Example
G	Gather Evidence  Good Practice	Demonstrate the value of your service  Be ready to defend – use statistics, impact LQAF, feedback	link to impact toolkit  http://kfh.libraryservices.nhs.uk/value- and-impact-toolkit/kfh-impact-tools/ K4h Policy Statement http://kfh.libraryservices.nhs.uk/nhs- lks-policy/



Letter	Meaning	Detail	Example
Н	Housekeeping  (Hope for the best)  (Help each other)	Change can unsettle staff and small issues can cause big upsets.  Look at having a mechanism in place for staff to ask questions or raise concerns.	Consider car parking, locker space, lunch at your desk, hot desking, transport between sites  Create a FAQs page on your Intranet/Internet.

Letter	Meaning	Detail	Example
	Induction	Staff induction  Engage with IT from the start.  Consider how they can help you. Linking early with IT can avoid so many issues later in the project and save hours of time.	Mini Induction at the sites where the staff are new to the workplace  Library Asst.doc  Specific software requirements.  Integration of Library
			Management System.

## J

Letter	Meaning	Detail	Example
J	Jobs	Review job descriptions  Understand staffing structure  Manage banding disparity  Identify any pre-existing flexible working / special arrangements – review  Job security  Ask for support from HR	Map out a structure that you think is workable. Do this with your counterpart if you can. Always ask for HR input to ensure you are not breaching Employment Legislation or accepted working practices. Remember to ensure staff have as much notice as possible for any changes to their working hours/location/work pattern.

# K

Letter	Meaning	Detail	Example
K	Knowledge Management	Ensure everyone on the team knows who each other's roles/areas of responsibility	Knowledge Management Toolkit <a href="http://kfh.libraryservices.nhs.uk/knowledge-management/km-goals-tools-and-techniques/">http://kfh.libraryservices.nhs.uk/knowledge-management/km-goals-tools-and-techniques/</a>
		Capture local organisation knowledge	Knowledge Retention and Transfer.docx

L

Letter	Meaning	Detail	Example
L	Language	Understanding the language used – e.g. definitions	
		Consider the language used.	
	Leadership	Lead by example, set the tone – be positive	

# M

Letter	Meaning	Detail	Example
M	Motivate	Stay motivated and motivate your team.	
		How do you motivate? Give ownership	
		Set tasks	
	Morale	Of those on the merger project team and those not involved but know work is going on.	
		How do you keep morale up	

## N

Letter	Meaning	Detail	Example
N	Negotiate	Be prepared to negotiate.	
		Identify deal breakers	
		Identify what you are willing to compromise on.	
		Being flexible	
		Have a plan	



Letter	Meaning	Detail	Example
0	Outcomes	What's the intended outcome.	
		Is everybody on side?	
		What is the intended outcome?	
		Review your service	
		Different to finish line?	
	Opportunity	Doing things differently Opportunity for change	

#### P

Letter	Meaning	Detail	Example
P	Patience  Plan  Procedures	Merging two healthcare providers is a huge task, don't be offended if some people haven't considered the library implications just yet.  (Template?)  Gantt table – time  Operational Plan  What are their's v.s yours – probably will be different.  Never assume you've thought of them all. You will find situations where neither of you have a procedure – what do you do know in this instance – can it be instantly resolved or do you need a stop gap arrangement.	Contact a key player on the management team and mention libraries and how they can help with some literature to support the global merger and get your service on the agenda that way

## Q

Letter	Meaning	Detail	Example
	Quality	Business as usual – maintaining quality	
		Library quality standards – how do they compare	
		See latest LQAF – identify areas for development / best practice	

## R

Letter	Meaning	Detail	Example
R	Resources	Staff, see jobs	
		Is the organisation expecting a cost serving and how will that be delivered – pay/non pay – both	
		Opportunity to de-duplicate	
		Contact suppliers – negotiate.	
		OpenAthens – is there a requirement to merge	
	Review	Take the opportunity to review ways of doing things and look at what other libraries are doing	

### S

Letter	Meaning	Detail	Example
S	Standardisation	Processes and procedures	
		Strategy	
		Access / Opening	
	Stakeholders	How changes will affect them, existing commitments to stakeholders impact on SLAs.	
	Subscriptions	Find out who bought what and when it needs renewing e.g. resources bought/arranged by other departments but administered through Athens/Library	
	Surprises	Be prepared there will be some. You won't be able to think of everything.	

#### T

Letter	Meaning	Detail	Example
T	Test, Test Time	Test processes and procedures in advance, and let colleagues know which ones can't be tested and warn there will be an element of having to wait and see how it works.  Everything takes longer than you think.  Allow extra time – plan for slippage  Be patient  Consider sharing diaries	

# U

Letter	Meaning	Detail	Example
U	Users	Keep users at the fore front of the decisions  You said, we did – poster  Intranet / Internet Newsletter	

### V

Letter	Meaning	Detail	Example
V	Value	For money – be prepared to demonstrate it	
		Value & Impact – see toolkit.	
		Costings framework – see	

# W

Letter	Meaning	Detail	Example
W	Work	The day job doesn't stop	Don't neglect the routine tasks that keep the service going. If possible task someone daily to be the core library operative if there are other discussions or pieces of work that are required for the merger
		Need to work hard to keep it going	Progress often appears to happen in fts and starts. Yiu can go for what seems like long periods of time without seeing any progress. If that happens remember to re contact others involved to catch up and remind them that you're still there!



Letter	Meaning	Detail	Example
X	X factor	Try as we might we couldn't get X in anywhere!	The X factor is the one thing no one thought of that will rear it's head at an unfortunate moment.  Deep breath and refer to any of the other relevant letters which might help!



Letter	Meaning	Detail	Example
Y	You	Whether you are leading change, part of a change or witnessing colleagues going through change you need to ensure your own wellbeing is looked after.	Support colleagues where you can and buddy up with someone who can support you either in the organisation or from the wider library community

Z

Letter	Meaning	Detail	Example
Z			