



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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# A

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
	Business Case	Use existing networks / contacts	Facilities/Estates – if moving libraries or stock
Identify key contacts in each organisation.			
		Will you be required to write a business case? If so, do you require any support?	<a href="http://kfh.libraryservices.nhs.uk/high-profile-health-libraries/making-the-case-advocacy/building-a-business-case">http://kfh.libraryservices.nhs.uk/high-profile-health-libraries/making-the-case-advocacy/building-a-business-case</a>

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

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





# 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 <a href="http://kfh.libraryservices.nhs.uk/value-and-impact-toolkit/kfh-impact-tools/">http://kfh.libraryservices.nhs.uk/value-and-impact-toolkit/kfh-impact-tools/</a> K4h Policy Statement <a href="http://kfh.libraryservices.nhs.uk/nhs-lks-policy/">http://kfh.libraryservices.nhs.uk/nhs-lks-policy/</a>

# H

Letter	Meaning	Detail	Example
H	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  IT	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  Capture local organisation knowledge	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>   Knowledge Retention and Transfer.docx

# L

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



# 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	





# Q

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



# 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, 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	<p>The day job doesn't stop</p> <p>Need to work hard to keep it going</p>	<p>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</p> <p>Progress often appears to happen in fits and starts. You 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!</p>

# X

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

# Y

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			