



Mergers, Alliances
and other ways of
joining up.

An ABC Approach
CASE STUDIES

Library Merger/Collaboration Case Study

<p>Libraries concerned: Bath, Salisbury & Swindon (W14, W11 & W01) Name of case study: STP wide Implementation of CLIO ILL System Date of merger/collaboration: October 2017 onwards Date of case study submission: April 2018</p>	
Context:	<input type="checkbox"/> Collaboration
Which libraries and/or Trusts are involved?	Academy Library, Royal United Hospitals Bath Foundation Trust Healthcare Library, Salisbury NHS Foundation Trust Academy Library, Great Western Hospitals NHS Foundation Trust.
Summary or objectives of the merger or collaboration	<p>A collaborative purchase of the CLIO ILL system. Two of the libraries previously used Winchill which was not ideal as it was specific to individual PCs, not accessible to other libraries in the area and had become unreliable for one library.</p> <p>As CLIO is web based the theory is that if one of the libraries required support in providing their ILL service due to staff shortages then any library assistant from the other libraries could step in & use the system. (This hasn't yet been tested)</p>
What went well	<p>Having a "lead" library for the implementation has provided a central point of contact & expertise for the other libraries.</p> <p>An additional benefit is of only one library needing to contact the supplier & thus building a relationship with them.</p> <p>The lead library has also been able to provide answers to questions / problems that have already been raised with the supplier rather than the supplier being contacted multiple times.</p> <p>Collaborative working with partner libraries has been a positive experience.</p>
What didn't go so well	<p>Our one training day with the supplier could have been much more clearly focused & productive – didn't achieve everything that we needed to.</p> <p>Different libraries were able to test / practice on the system at different speeds which meant we were at different points when agreed date for go live came round</p>
What were the learning	Plan extensively in advance with supplier objectives / required outcomes for any training days.

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points from this?	Extended testing / practice phase – we went for 1 month of testing but at the end of this we were all at different points so go live was delayed. Would have a longer testing phase should we collaborate on a project again.
Please provide your email address if you are happy to be contacted or to mentor those going through the process. Jason.ovens@nhs.net	

Library Merger/Collaboration Case Study

Libraries concerned: Library Education & Resources Centre and Health Library Name of case study: Date of merger/collaboration: 2014 Date of case study submission:	
Context:	<input checked="" type="checkbox"/> Full merger <input type="checkbox"/> Partial merger <input type="checkbox"/> Collaboration
Which libraries and/or Trusts are involved?	Mid Staffordshire NHS Foundation Trust University Hospital of North Staffordshire
Summary or objectives of the merger or collaboration	Provide a uniformed service across both sites with minimal disruption to customers. This includes re-classifying of books at LERC, policies and procedures, new LMS which is part of Keele University.

What went well	<ul style="list-style-type: none"> • Strong working relationships between managers – a clear advantage is the managers at the two sites already knew each other through attending the same patch meetings and various other regional meetings and conferences. So both knew about each other's services. • During the merger the two library managers had regular meetings to discuss their budgets, resources, policies and procedures and staff. Both managers were able to support each other along with staff on both sites to enable a reasonably smooth transition without too much disruption to their services. • Open communication with staff once we knew when the merger was going to take place • Clear objectives and management direction • Able to pool resources and avoid duplication. LERC have access to more electronic resources. • Able to get experienced library staff from the Health Library to cover staff shortage. This was a big plus as it meant not having to spend time training up a temp.
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	<ul style="list-style-type: none">• Although there were two library managers nothing was actually put in writing who would manage who. Our priority at the time was to get the services running smoothly with minimal disruption both to customers and staff. Neither manager knew what to expect so supporting one another at the time was essential.
What didn't go so well	<ul style="list-style-type: none">• Short time scale so a lot to do once we knew the exact date of merger. Nearly 4 years down the line and still working on various policies and procedures.• Even though we thought we had lots of things covered it wasn't until after the merger that we found problems.• Impact on staff morale – because of uncertainty during the transition and just after, we had staff vacancies. Recruiting to these posts was delayed due to new HR systems in place and also restructuring of posts in various admin departments. Getting use to different policies and systems (more organisational than library).• Weren't allowed to discuss the merger until we had a date and even then this was changed.• Short term impact on service delivery due to staff shortage.• IT infrastructure – on two different systems and during merger having to deal with two IT departments.• Need to re-classify all book stock to align with Health Library• Merger of two services means licencing costs go up• Website presence on Trust Intranet and also Health Library Website• Our catalogue and webpage is geared up for NHS users so for certain e-resources like Clinical Key books can be searched for on our catalogue – this can't be done on the Health library catalogue as shared with Keele.• At LERC during the merger users with a Mid Staffs Athens account could also have a Stoke Athens account this caused confusion amongst new Trust members at County who were only entitled to a Stoke Athens.• Various problems between library users wanting to use both

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	<p>libraries and not being able to access the library out of hours.</p> <ul style="list-style-type: none">• Library members having to join at both libraries – so two separate cards plus an extra card if Stoke members want out of hours access.
What were the learning points from this?	<p>No matter what you prepare for beforehand, there will always be something that trips you up. But as long as you are open and honest with staff it can be worked through.</p> <p>If there are two library managers already in post you will have to accept that one will be managing the other. We at HL and LERC have been very lucky as the manager at LERC still has her own budget and is still responsible for her staff.</p> <p>As we all have to report to someone it doesn't have to be a battle to report to another library manager. If anything it actually works well as the LM knows and appreciates your problems and has more of an understanding of what you are going through. So don't fight with each other, work together and you will have a happy outcome when the merger happens.</p>
<p>Please provide your email address if you are happy to be contacted or to mentor those going through the process.</p> <p>lyn.brain@uhnm.nhs.uk</p>	