Top tips to help guide you when thinking about merging......

There are a number of key points you might like to bear in mind:

- Be prepared to eat, drink and sleep mergers but remember that the majority of your staff won't be at the same level as you so will need to hear information many more times than you might think is reasonable! Also, be aware that if there is a void in information, staff will make up gossip to fill it so give regular updates on what is happening, even if it is that there is no news.
- Your practice team will all reach a point of acceptance about the change in their own time-frame. Some staff will be sad, many in denial, some may be angry about having to work in different ways and may feel a sense of loss at the prospect of losing autonomy. You do have to accept that they will all have to find their own way through the process with you there as a constant in the background. I sent out a document about managing change to the team which some staff found very helpful: http://www.exeter.ac.uk/media/universityofexeter/humanresources/documents/learningdevelopment/the_change_curve.pdf
- Even without receiving approval from the Primary Care Team in your ICB, you may be forced to go public with the information earlier than you are ready to, as once the staff are aware it is often no time at all before patients start hearing the plans. Our nurses heard from a patient very early on that they were all going to be sacked which caused no end of damage as you can imagine! We put out a brief flyer in the practices and on the websites talking about our intention to merge, which we have since followed up with a firm plan and timetable.
- Before going out to the wider public, talk to your PPG and seek support to the principle of merging. If you are rolling out more services over longer hours, therefore improving patient access, it is easier to pitch as everyone will benefit but you may need to undertake a full public consultation if there is a net loss to services through premises being closed, which the Primary Care Team in your ICB will be able to guide you through.
- As you still have a day job to manage, think about freeing up key members of your team to support some of your work, e.g. you may consider employing a deputy on a short-term contract, or extra admin staff to help with information gathering.
- Electing a Merger Team with two of the partners working with the PMs for us was a more efficient way of encouraging decisions to be made as with a larger group, there are many more opinions to hear and more chances of disagreement!
- Although ultimately it is a partnership decision to merge, the relationship between the two PMs is fundamental. I am incredibly fortunate in that we are already close colleagues but we also have very complimentary skill sets, which will be instrumental in shaping two PM posts within the same practice from two independent businesses.
- Early contact with the Primary Care Team in your ICB was beneficial – for Wessex there is now a tried and tested template application process but be prepared that whilst this part is reasonably straightforward, there may be long delays before hearing anything and you might have to bite the bullet and press on. We submitted the application in October and didn't receive the green light until January – had we left making a start until then, it would be very difficult to do the work that we had already done in half the time.
- Talk to the LMC early in the process, as well as the Primary Care Team in your ICB, particularly if you are facing a recruitment crisis and key members of the practice leave, as it is important both organisations are aware so that measures of support can be put in place if necessary.
- Engage a solicitor early in the discussions to draft a Merger Deed, which will protect and guide the merger process in terms of indemnity, due diligence and timescale. This is particularly important if premises are to change ownership and one of the partnerships will effectively dissolve to create the new business. If the two practices share a common solicitor

as we did, be prepared for one of you to have to find a new solicitor to avoid any potential conflicts of interest.

- It is very important to have an understanding of the legal framework to support the process, particularly if there is any possibility of staff redundancy or contractual change required. We attended an ACAS course at the start of the process, which gave us a broad understanding of TUPE transfers and had some useful case examples from different organisations that had been through the process. This gave us a good platform to start the consultation process of 1:1 discussions with all the practice staff, which has been a key to being able to create the new staffing structure.
- Try to have an idea fairly early in the process of how your appointments system might be set up as this will guide how the IT/telephone systems will need to be configured, which may potentially be your biggest areas of expense. Discuss any costs with the Primary Care Team in your ICB and the AT to establish whether there might be any capital funding available to help – we included new workstations as part of our IT bid and have been successful in securing the funding for these.
- Be prepared for not all of the partners to be on board with the plans, and for some to be challenging. Give yourself time to fact-find before presenting proposals and seek support from the partners who are more closely involved however, make sure that ultimately, they are behind the plans so that you don't end up being the scapegoat if things don't come together as anticipated.
- Understand and accept very early on that with every good intention and a lot of hard graft, many things will not be in place before the merger and may not be for months afterwards. You will have curved balls to navigate (for example, we sought a quote for a stud wall as part of a reception refurbishment project and were shocked when the estimated cost for this came out at £54k) and there will be areas that distract your time for longer than you thought but you have to have faith that the idea you thought of all those months before will pay dividends eventually.