

# It's mergers time: how to survive and thrive when leading mergers of CILIP branches and groups

**Janine Bhandol, Maria Giovanna De Simone, Niamh Tumelty and Lizz Jennings** share their experiences of merging the East of England Members Network (formerly East of England Branch and CDG), and the South West Members Network (formerly South West Branch, CDG West Country and CDG Devon and Cornwall).

CILIP undertook a review of groups and branches in 2011, to gain a better understanding of the landscape in which CILIP members are operating. The East of England and the South West branch were asked to consider merging with their local Career Development Group divisions, in order to help identify merger models to be shared with other groups willing to take the same route. Having now completed the process, we would like to share with you what we learnt along the way.

**What did you think about the suggested merger of branch with CDG division?**



**Maria Giovanna:** I felt it was a good opportunity to bring about change. At the same time, the process needed to be defined more clearly. CILIP gave us the freedom to decide how to proceed. We therefore had to identify a strategy, plan carefully, and be ready to adjust our plans along the way.



**Niamh:** I thought it made a lot of sense - why join CILIP if not for continued professional development? Why should the work of the Career Development Group be something you have to choose as an extra rather than being integral to what happens at local level?

**Janine Bhandol is East of England CDG Chair 2012, Maria Giovanna De Simone and Niamh Tumelty are East of England Branch Co-Chairs 2012, and Lizz Jennings is South West Division Chair 2012.**



**Janine:** I felt the time was right for change. We had been working closely together for the past few years anyway, and this seemed like the next logical step.



**Lizz:** We had all been working closely together for some time, and had been arranging joint events where suitable. Annette Earl put together a proposal for the three groups, which we worked into a mission statement, and all three groups were hopeful about the opportunities a merger would offer.

**What happened next?**

**MG:** We held a joint meeting between the two committees, talking about technicalities (finances, journals, web presence etc); what we felt the core mission of a merged group should be; and what activities we should aim to keep. We agreed that we needed to work together first, in order to get to know each other and enhance collaboration before launching a merged group.

**J:** We wanted to be as inclusive and transparent as possible about the whole process, so after the initial meeting we put together a consultation paper outlining the vision and roles in the proposed new group. This was put on a shared wiki so that both committees could share their thoughts and propose changes or new ideas. There was a lot of positivity, commitment and drive from all concerned, though naturally some nervousness about the change process and what it might mean for individuals. CILIP has really dedicated volunteers, and everyone on both committees worked really hard to push the process forward. The wiki was very helpful in providing an open forum to do this.

**L:** Each committee discussed the idea internally, and when we were all sure we wanted to try this, representatives from the two CDG groups attended a meeting of the South Western Branch, and we talked about the practicalities of getting started.

#### How did you form a committee?

**N:** We surveyed members of both branch and CDG division committees half way through the year to determine who was interested in staying on the committee, and in which roles. Sharing the results of this early poll gave plenty of opportunity for members to consider positions and discuss them with the current post-holders, so by the time we held our final joint meeting in November every position had been filled.

**L:** Annette had devised a structure in her original proposal, and we made some changes to fit our activities. We then talked this through with the branch, and in order to start the process as swiftly as possible, we formed a

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co-opted committee from the previous three, with the intention of holding elections after the first year. We wanted to give the new structure time to settle and have revised it several times over the year as we have begun to understand what is needed.

#### What about finances?

**N:** We were advised that the finances should be audited separately at the end of 2012 and could be merged following this audit. The Treasurer of the new group will need to keep the finance information from both committees for a certain amount of time.

#### What problems did you encounter and how did you resolve them?

**MG:** We faced some technical problems, for example the non-matching boundaries of the two geographical areas, and the need to allow Eastern CDG members to

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## Five top tips for merging

- 1 **Communication and transparency: everyone should feel involved and informed**
- 2 **Psychology: know the personalities you are dealing with**
- 3 **Flexibility: be ready to change your plans**
- 4 **Time: don't rush, but don't drag out the process for too long either**
- 5 **Vision: of what you want to achieve and how this new group can do it!**

choose an alternative special interest group. CILIP HQ and CDG National Council helped us to solve these issues. However, the main issues were psychological, with members of both committees feeling that the groups might lose their specific remits, rather than enriching their offer to members. We addressed this by communicating openly, and keeping the two committees in the loop as much as possible.

**L:** It has been a steep learning curve, with all three groups having to learn how the others operated to ensure nothing was left out. We have also struggled to publicise the merged group, although this is improving. The area we cover is extremely large, and finding meeting places which are accessible to all is an ongoing issue.

### What do you think will be the advantages of a merged group?

**N:** The merger has been an opportunity to think about what branch and CDG division offer, what should be retained or added, resulting in a better overall offer for members in our region. Better communication between groups operating in the region will result in fewer clashes in events planned, and one committee means fewer committee meetings overall, lower expenditure on meetings and more money to put towards supporting our members.

**L:** We are providing a more consistent offering of visits and courses over the region, and are able to run the same event in several different locations. We can publicise events to all members in the area, and sponsor events that benefit a large number of library workers such as Library Camp.

### Was there a moment when you realised a positive outcome was likely?

**MG:** At the two joint meetings, I felt people were willing to reach a positive outcome. After communicating by email and via the wiki, meeting in person made the difference, and it allowed us to find common grounds more quickly and easily.

**L:** There was a long, uncertain gap between the branch meeting and the first merged group meeting, but it was positive and productive and at this point the merger process seemed not only feasible, but also desirable.

### What do you think the new group should do?

**N:** The new group should be able to create a network that truly reaches across the region - we currently share the difficulty faced in many branches that activities tend to be focused in a few locations. We need to continue to improve communication with members, providing regu-

lar opportunities for members to meet with information professionals from different sectors and different parts of the region and to work closely with special interest groups to cater to members' areas of professional interests. Most importantly, we need to support members at all stages of their professional development, from new professionals through post-qualification years right up to the later stages in the professional career.

**L:** We were keen to continue providing a range of library visits, something that all three groups had previously been strong on. We also wished to extend the career support offer to all members, particularly since the changes to qualifications since 2005 have made routes to chartership more flexible. Finally, we wanted to be inclusive and welcoming to CILIP members across the region, and to encourage participation and professional activism, whether ongoing or occasional.

### Would you recommend that other groups follow this route?

**MG:** Every group is different. It's important to understand the people you are working with, and adjust the plan accordingly. If you 'personalise' the process, making it look less bureaucratic, you are more likely to succeed. This might mean running the process in a completely different way from what we chose to do.

**N:** I agree with Maria Giovanna, but would add that there are both advantages and disadvantages to merging. The merged committee will have a lot to cover if delivering opportunities previously offered by two groups, but I think this can be achieved, especially with the support of project teams that can include people that are not on the main committee. For example, as New Professionals Support Officer I intend to work with a team of new professionals from across the network to ensure that we are meeting their needs. This has the added benefit of getting new members involved in the work of the branch and therefore more likely to put themselves forward for committee vacancies as they arise.

**J:** I think one of the biggest things for groups to consider is that this is essentially a process of managing change. So I would advise Chairs or other stakeholders involved to read up on the change process and how best to manage it. Get some training if you can, and talk to as many people as you can who have undergone similar experiences. Also, make use of CILIP – they are very supportive and have a lot of experience to help branches and groups through the merger process.

**L:** Working closely is a critical first step which makes the merger possible and has the potential to give members a consistent offer and opportunities to become involved. I would encourage separate committees to look for areas in which they can collaborate. Committee members are active, committed professionals and while there may be differences of opinion, working together is a great learning experience for all involved and can definitely bring benefits to all the members they are working for. **[1]**

## Feedback

**We're very interested in any feedback, and more than happy to share further details of our experiences. You can contact us using our regional email addresses: [cilipeast@gmail.com](mailto:cilipeast@gmail.com) and [cilipsw@gmail.com](mailto:cilipsw@gmail.com)**