

Case Study: University Hospitals Dorset

Civica Engage anchors seamless merger and creation of new NHS Foundation Trust membership body

Ongoing support for Foundation Trusts customers as two become one:

The Royal Bournemouth and Christchurch Hospitals NHS Foundation Trust and Poole Hospitals NHS Foundation Trust are customers we have supported with our membership platform, Engage, for the past decade. The two merged on the 1st of October 2020 to form University Hospitals Dorset NHS Foundation Trust. Following confirmation that they were merging at the start of 2020, we were asked to provide the administrative support needed to ensure a successful and seamless merger of the two trust's memberships.

As the leading membership database provider to the sector for many years, in more recent times we have also been providing extensive administrative and technical support to merging and acquiring trusts as the sector evolves, and sharing best practice for what can be a difficult set of processes and procedures at a time when good data security and information governance is even more in focus than usual.

Our Approach

This job required a considered approach due to its large scale, the local sensitivities and politics, and a number of moving parts and critical timings. In addition to handling the mechanics of altering the database, we were appointed to assist the two trusts with all their

pre-merger membership activities – informing members of the upcoming merger, handling all member responses therein, and reconfiguring and building a new database for the newly merged Trust on 1st November 2020.

Steps we took

- Face to face meetings with stakeholders from the merging Trusts to map out relevant activities and timelines in line with regulatory requirements
- Consultancy and advice on communications template and design
- Dedicated project management
- Provision of an email and postal opt-out mailing service to members of both Trusts
- Setup and management of a dedicated helpline to handle responses from members
- Regular updates sent to clients to ensure they had visibility into how the helpline was progressing
- Delivery of a new and secure database to house membership data
- Aftercare

Outcomes

Thanks to our efforts, University Hospitals Dorset were able to successfully communicate their merger plans to over 16,000 members, manage member 'opt-out communications' and update their member information via a dedicated helpline and transfer their membership data into the newly built database

16.5k

members sent communication

98%

members transferred to the new trust



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