

# **Proposed Merger of the Wye Valley Hospice and the Carholme Trust**

## **Reading IT Consultancy Services Briefing Document**

### **Introduction**

As part of our commitment to support the community we have offered our services to advise on the IT aspects of the proposed merger between the Wye Valley Hospice and the Carholme Trust. Although we are giving our time freely to this project you are still expected to act the same professionalism and high standards we provide to all our clients.

One of your colleagues has already completed preliminary surveys of the existing IT facilities of the two organisations; this is included below. In addition, interviews have been carried out with the current management teams of the two organisations to ascertain their aspirations for the merger and any constraints that they feel may have.

You are required to provide a written consultancy report. The report is to cover how IT can be used to benefit the merged organisation, how IT can contribute to the goals of the organisation and should highlight any problems or issues that are likely to arise. You should concentrate on how commercial off-the-shelf software could be used but should indicate any areas that you feel might benefit from custom or bespoke software. You should provide outline costs of your proposals and justifications for all of your recommendations.

The target audience is the management and staff of the two organisations. There is no need to repeat any of the information provided in this briefing document. Your report should not exceed 4 pages of A4 (excluding any back-up material) and should be in the form of a professional consultancy report. In addition you should prepare a 10 minute presentation summarising the main points, your recommendations and your reasons. This is for the same target audience.

You are required to provide a printed copy of the report, and printouts of your slides (2 per page), along with speaker's notes if you have chosen to provide them. Note that it is not necessary to provide colour printouts, either in the document or the slides, greyscale is sufficient.

### **Background Information**

#### ***The Wye Valley Hospice***

The Wye Valley Hospice is a charitable trust that provides accommodation for terminally ill patients. The hospice is owned and maintained by the trust but nursing care is provided by specialist nurses from Macmillan Cancer Relief. The trust owns the building, maintains it, furnishes it and provides ancillary staff such as reception and security. There are also a number of volunteer helpers who work with the patients.

The main sources of income to the trust are direct donations, bequests from wills and the profit from two shops in nearby towns. Shops are rented at low rates from their landlords while they would be otherwise unoccupied.

The trust employs a receptionist / secretary, a night watchman, a maintenance man / gardener and a shop manager. The receptionist and shop manager both have internet connected PCs used for word processing and e-mail (using Hotmail accounts). The trust does have a small website using hosting and a web development service donated by a local company and is able to handle some enquiries by e-mail. Staff allocation and management of the volunteers is done manually. Allocation of places for care is handled by the Macmillan staff who are best placed to decide priorities.

### ***The Carholme Trust***

The Carholme Trust is a charitable trust that provides day care and respite care for cancer sufferers and their families, and organises and operates day trip outings. The trust rents space in a community centre from the local council for day care and also has a small administration office. The community centre is used for other purposes in the evening so all furniture and equipment must be moved into storage cupboards at the end of each day. Care is provided by two full-time trained staff and a number of volunteers. Day care spaces are limited and a booking system operates for places up to four weeks in advance. This is done using a whiteboard in the administration office.

Income for the trust comes from a grant from the local council, direct donations and the profit from a shop in a nearby town.

At present IT facilities are extremely limited. The administration office contains one PC and a printer used for word processing of letters and production of a simple newsletter. Most other functions are wholly manual and paper based, for example contact information and records for patients, carers and volunteers is kept in files organised by surname. The newsletter is duplicated by a print shop and address labels are produced from a mailing list held as a tabular document in the word processor. Addresses must be updated manually; there is no link to the paper files. Accounts are kept on paper and tax returns completed by an outside accountant each year.

The shop contains an electronic cash register which is used to record daily takings. The totals are printed each day and stored for accountant. There is no stock list maintained and prices of goods are determined by shop staff and written on by hand.

In addition to the paid carers, there is also a paid administrator / secretary. All other labour is provided on a volunteer basis. The trust is administered by a board of trustees.

### **Aspirations for the Proposed Merger**

The merger of the two organisations has been proposed as there are obvious synergies in the services that they provide and some overlap in their administrative and fund raising functions. It is not intended to reduce the number of staff but rather to increase the range and quality of services that the merged organisation is able to provide.

The possible changes and improvements fall into a number of categories:

## ***Premises***

By moving the Carholme day care centre into the premises owned by the Wye Valley trust a permanent location can be provided. If the furniture and equipment does not have to be put away each night a better quality environment can be provided.

All administration functions can be combined into a single office in the Wye Valley premises.

The three existing shops will be reduced to two, one in each of the nearby towns.

## ***Retailing***

It is hoped that the organisation of the shop volunteers can be taken over by the administration staff, leaving the shop manager to concentrate on improving stock control and increasing profitability. Most goods are donated and shop space is limited so a large proportion of donated goods are often discarded or passed on to other charities. The decision about what to discard, and how to price items is based on past experience and anecdotal evidence. It is thought that improvements could be made in profitability if better records are kept of what is sold and how long it takes to sell. In addition, the shops are also starting to stock a limited range of wholesale purchased goods such as “Fairtrade” coffee and ethnic items. The shop manager would like to increase the range of these goods available but only if she can be sure of their profitability.

## ***Administration***

It is hoped that staff allocation and payroll calculation can be automated, and the trust would like to consider bringing the accounting function in house and computerising the payment of bills, raising invoices and so on. For the day care places the trust would like to increase the advance booking period to a year but to impose some sort of points based “fairness” system whereby places during periods of high demand (school holidays for example) cost the patient more “points” than using the centre at quieter times. Patients would be limited to a certain number of points in a given period of time.

## ***Communications***

An increasing number of volunteer staff are asking to communicate with the trusts via e-mail. It is hoped that a proper e-mail system can be provided, with addresses for all members of staff and generic addresses such as [enquiries@wye-valley-trust.org.uk](mailto:enquiries@wye-valley-trust.org.uk). The staff allocation system could then link to the e-mail system to send notifications to volunteers as to when their services are required.

The trust would also like to improve the quality, presentation and circulation of a new, joint newsletter. They would also like to greatly improve the website to add further information for patients and carers, and to be able to update this information themselves. They would also like to be able to accept donations through the website using credit cards.

It has also been suggested that it would be beneficial for patients both in the day care centre and the hospice itself if they had access to the internet at their bedside. It should however be noted that some patients have visual or motor skills problems and these need to be catered for.

### ***Other***

This list is not intended to be exhaustive and the trust is open to any suggestions that may enhance its operation, increase its fund raising ability or improve the services and care provided to patients.

KRW 22/10/04

NOTE: The Wye Valley Hospice and Carholme Trust organisations referred to are fictitious, no reference to any existing location or organisation is intended, although they are based on real examples.