

Shared Services Joint Committee

Monday, 17th October 2022, 6.00 pm

Council Chamber, Town Hall, Market Street, Chorley, PR7 1DP

Agenda

1 **Apologies for Absence**

2 **Minutes of meeting Monday, 27 June 2022 of Shared Services Joint Committee**

(Pages 3 - 6)

3 **Declarations of Any Interests**

Members are reminded of their responsibility to declare any pecuniary interest in respect of matters contained in this agenda.

If you have a pecuniary interest you must withdraw from the meeting. Normally you should leave the room before the business starts to be discussed. You do, however, have the same right to speak as a member of the public and may remain in the room to enable you to exercise that right and then leave immediately. In either case you must not seek to improperly influence a decision on the matter.

4 **Shared Services Monitoring Report**

(Pages 7 - 34)

To receive and consider the report of the Director of Change and Delivery.

Gary Hall
Chief Executive

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WORKING TOGETHER

Minutes of **Shared Services Joint Committee**

Meeting date **Monday, 27 June 2022**

Members present: Councillors Alistair Bradley (Chair), Alan Cullens, Terry Howarth, Councillor David Shaw, Margaret Smith, Kim Snape, Michael Titherington, Matthew Tomlinson, Karen Walton and Peter Wilson

Officers: Gary Hall (Chief Executive), Chris Sinnott (Deputy Chief Executive), Vicky Willett (Director of Change and Delivery) and Charlotte Lynch (Democratic and Member Services Officer)

Other Members: Councillors Julia Berry, Karen Derbyshire, Dedrah Moss and Phil Smith

18.1 Appointment of Chair and Vice Chair

Resolved: (Unanimously)

That

1. Councillor Alistair Bradley be appointed as Chair of the Shared Services Joint Committee for the 2022/23 municipal year; and
2. Councillor Paul Foster be appointed as Vice Chair of the Shared Services Joint Committee for the 2022/23 municipal year

18.2 Apologies for Absence

Apologies for absence were received from Councillors Aniela Bylinski Gelder, Paul Foster and Margaret France.

Councillors Matthew Tomlinson, Mick Titherington and Terry Howarth attended as substitutes.

18.3 Declarations of Any Interests

None.

18.4 Minutes of meeting Thursday, 3 February 2022 of Shared Services Joint Committee

Resolved: (For: 6 Abstain: 4)

For: Councillors Bradley, Cullens, Shaw, Smith, Tomlinson and Walton

Abstain: Councillors Howarth, Snape, Titherington and Wilson

That the minutes of the meeting of the Shared Services Joint Committee held on Thursday, 3 February 2022 be approved as a correct record.

18.5 Minutes of meeting Thursday, 10 February 2022 of Shared Services Joint Committee

A query was raised as to why only one of four members who attended the meeting virtually and in a non-voting capacity was recorded as having abstained on the vote.

It was agreed that the minutes be amended to reiterate that the meeting was held informally to further discuss proposals brought forward at the meeting prior and that the regulations around voting and virtual attendance did not apply.

Resolved: (For: 6 Abstain: 4)

For: Councillors Bradley, Cullens, Shaw, Smith, Tomlinson and Walton

Abstain: Councillors Howarth, Snape, Titherington and Wilson

That the minutes of the meeting of the Shared Services Joint Committee held on Thursday, 10 February 2022 be approved as a correct record subject to the amendment detailed above.

18.6 Shared Services Monitoring Report

The committee received a report of the Deputy Chief Executive which provided an update on phases 1 and 2 of shared services between Chorley and South Ribble Borough Councils.

The report highlighted staff satisfaction, savings and benefits and progression against service development objectives.

Much of the discussion focused on staff satisfaction and a recent pulse survey which found that over 75% of staff within phase one of shared services and ICT were happy overall in their job.

Concern was expressed, however, that only 24% of those within customer services and revenues of benefits agreed with the statement.

In response to member queries, assurances were provided that proactive measures were in place to enable staff engagement until the next pulse survey in September.

Mitigation measures such as temporary contracts were also in place to alleviate capacity issues as a result of annual leave and vacancies.

Members expressed concerns regarding the impact on service for residents and suggested that the risk register be amended to a red matrix score. Officers were happy to revise this but it was agreed to assess this again at the next meeting to allow for new mitigation measures to impact service delivery.

Although members were concerned about current service delivery within customer services and revenues and benefits, contextual factors outside of the Councils' controls, such as the £150 tax rebate and universal recruitment issues, were also highlighted.

The committee also suggested that staff should have sight of the service plan relevant to them to keep them informed and engaged with any changes. Officers undertook to facilitate this and would share the plans with the committee.

The report was noted.

18.7 Shared Services Future Development

The committee received a report of the Director of Change and Delivery which outlined the proposed approach for the delivery and implementation of phase 3 of shared services.

It was proposed that the Councils' Property and Assets functions form the next phase of shared services and members were advised of the evaluation process and criteria undertaken to identify the proposal.

Other opportunities for sharing were detailed within the report and it was confirmed that, although these were not being proposed on this occasion, they would be reviewed again in the next 12 months.

As Cabinet Member for Finance, Property and Assets at South Ribble Borough Council, Councillor Matthew Tomlinson particularly welcomed the increased resilience that a shared Property and Assets service would provide.

A query was raised as to whether any staff within the current services would be eligible for early retirement voluntary severance (ERVS) and officers would confirm this to members outside of the meeting.

Confirmation was also provided that proposals for future phases of shared services would only be presented to the committee once phase 3 had been undertaken and key projects such as the Local Plan and Economic Strategy had been completed.

Resolved: (Unanimously)

That the proposed approach for phase 3 of shared services be recommended for discussion at Councils.

Chair

Date

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WORKING TOGETHER

Report of	Meeting	Date
Director Change and Delivery	Shared Services Joint Committee	Monday, 17 October 2022

Shared Services Monitoring Report

Is this report confidential?	No
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Is this decision key?	No
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Purpose of the Report

1. This report provides an update on the phase 1 and 2 shared services between Chorley Council and South Ribble Borough Council in relation to budgets, service development objectives, performance, staff satisfaction, and risk.

Recommendations to Shared Services Joint Committee

2. To consider the shared services monitoring report and note the current progress for phase 1 and 2 services.

Reasons for recommendations

3. The monitoring report provides quarterly updates on Chorley and South Ribble's shared services arrangements, allowing the Committee to regularly monitor progress and performance.

Other options considered and rejected

4. This report is for noting only and so there are no other options to consider.

Executive summary

5. This report provides a quarterly update on the phase 1 and 2 shared services between Chorley Council and South Ribble Borough Council including updates in relation to:
 - a) Staffing and budgets overview
 - b) Staff satisfaction
 - c) Progression against service development objectives
 - d) Service performance
 - e) Risk review

6. Overall, performance across shared services has been good. Most of the original service development actions have now been completed for the phase 1 services, which have now become further embedded as shared functions working across both councils, and focus is now on the delivery of the refreshed objectives for 2022/23. The Customer and ICT services have also made progress in the delivery of their shared operating models, with recruitment to vacant posts within the teams increasing capacity and supporting service delivery.

Background

7. Phase 1 shared services including Transformation and Partnerships, Communications and Visitor Economy and Governance services were implemented in April 2020, with the restructures for the services completed in November that year. A number of teams have also been reviewed after this date including Events, and Museums, Tourism and Culture in the Communications and Visitor Economy service and Health and Safety and Corporate Support in the Governance service.
8. The phase 2 shared services were implemented in November 2021 for ICT and March 2022 for Customer Services.
9. Regular monitoring reports are to be presented to the Shared Services Joint Committee to provide an overview of action and performance in delivering the shared operating models across the newly shared services. An annual review will be conducted in Q1 2022/23 to provide a more in-depth overview of benefits realisation and best practice.

Savings and budgets

10. Overall there has been in excess of £1.6m savings realized with over £900k at CBC and over £700k at SRBC.
11. Most services operate on a 50/50 basis with exceptions reflecting the specific needs of either authority. These exceptions include:
 - IT Infrastructure Team which is split 40% CBC and 60% SRBC
 - Events Team which is split 60% CBC and 40% SRBC
 - Services that relate entirely to one Council including CBC Town Hall and Civic Services staff.
12. Unlike the rest of Shared Services within Customer Services and ICT there is no specific host Council. The posts are employed and shared across both Councils and recharged on a 50/50 basis.

Staff Satisfaction

13. Staff satisfaction within shared services has been measured through the Pulse Survey which is carried out every 6 months for all services across both councils to provide a regular check in and monitoring on staff satisfaction and wellbeing. This is repeated more frequently for shared services staff and was last captured in September 2022. The survey asks staff questions around:

- understanding of how their service contributes to delivering the priorities of the councils/ shared services
- understanding of their role within their directorate/ shared services
- if they have the skills and knowledge needed for their role
- overall happiness with their jobs.

14. The survey also provides an opportunity for staff to provide anonymous written feedback.

15. 106 members of staff completed the survey which represents around 45% of all shared services staff. The table below outlines the percentage agreement across all shared services with the survey questions, demonstrating significant improvements since the previous survey in June, with a 14% increase in overall happiness with jobs.

Question	September 2022	June 2022
I understand how my service contributes to delivering the priorities of the council/both councils.	96.2%	87.5%
I understand my role within my directorate/council/shared services.	92.5%	86.8%
I have the skills and knowledge needed for my role	88.7%	89.0%
Overall, I am happy with my job	71.7%	58.1%

16. In the previous survey, staff satisfaction for Customer Services and Revenues & Benefits was identified as lower than phase 1 and ICT services. Written feedback suggested that this was primarily in relation to the lack of capacity and high workloads within the service due to vacancies and new service demands such as the administration of the Government’s Council Tax Rebate scheme. A comparison between the survey in June 2022 and the latest survey in September is outlined below indicating significant improvements across the Customer Services and Revenue and Benefits service, including a 39.4% increase in those who agree or strongly agree that they are happy with their job. We continue to hold regular focus groups with the team to ensure that satisfaction is further improved.

Question	September 2022	June 2022
I understand how my service contributes to delivering the priorities of the council/both councils.	95.1%	74%
I understand my role within my directorate/council/shared services.	87.8%	74%
I have the skills and knowledge needed for my role	85.4%	84%
Overall, I am happy with my job	63.4%	24%

17. Open feedback was submitted by over half of staff. Key themes included:

- **Improved capacity in teams** for phase 2 services with over 17 appointments in the last few months in Customer Services and Revenues and Benefits and nearly

a full team now in place for the ICT team, Staff indicated that this had helped with morale and presented a tangible improvement to the service. Next steps include resolving the remaining few vacancies in these areas, and ensuring new staff receive relevant training. Plans have now been developed and are being progressed to support the development of new and existing staff.

- **High workloads** across all service areas. Whilst capacity has been increased in relevant service areas, teams are still handling high workloads due to service demands and some backlogs of work. It is expected that this will ease as new starters, systems and processes become more embedded into the teams.
- **Improvements in ICT and Communications**- staff have identified that there have been improvements to ICT and organisational wide communication but that there are still some areas for further development. These include communications to introduce staff to new colleagues, recognition of work and the specific challenges of working in shared services, and further developing good working relationships across teams. A dedicated ICT plan has been identified to drive forward further improvements in infrastructure and technology, and a new People Strategy is currently being implemented with specific interventions targeted at team development and reward and recognition.

Service Level Development

18. Each service has identified several service development objectives to set out the transformation and development of the shared services to a single operating model. These are refreshed annually to reflect continuous improvement of the services.
19. The phase 2 service development objectives were identified as part of the approval of the proposals for the shared services. ICT became a shared service in November 2021, and Customer Services in March 2022. The services have completed initial work against their objectives to begin implementing shared models despite initial challenges in relation to capacity and service demand such as significant infrastructure improvements and processing the council tax rebate. Recent success in recruitment to these services has helped to progress the delivery of the plans.
20. The full service development objectives and status update for 2022/23 are available in appendix A.
21. Some of the work that has been completed over the last quarter towards developing a single operating model includes:

PHASE 1- Transformation and Partnerships, Communications and Visitor Economy, Governance Services

- A plan and timetable have been developed for the roll out of the new Terms and Conditions to all staff across both councils. This will align the conditions across shared services, and non-shared teams, and will offer benefits including an improved offer for staff. Initial briefings have been carried out across both Councils with the Director for Change and Delivery to deliver key messages. Further service and individual level briefings form part of the roll out plan.
- Work has continued on the delivery of phase 2 of the HR transformation project including the roll out of HFX time management systems and the end-to-end recruitment

solution. This will build on the benefits secured by the implementation of the shared HR hub by streamlining and automating processes, ensuring that they work well for staff, candidates, and new recruits. A plan for the delivery of the project is currently being established and scoping work taking place to identify the councils' requirements for the new system modules.

- The events programme has continued to be delivered successfully through the newly established shared events team including Leyland Festival, Music in the Park and a taste of Leyland at South Ribble, and What's Your Story, Chorley 10k, Picnic in the Park and Chorley Flower Show at Chorley. Preparations are now underway for Autumn and Winter events such as the Christmas Lights Switch On.
- A review into the Corporate Administrative Processes has been completed and has enabled the Corporate Support Service to streamline their support offer, automating processes where possible to ensure an effective and efficient service.
- The Procurement Restructure has been completed, with recruitment currently taking place for the 3 new posts. The review has resulted in revenue budget savings of £11,699 in total and will see the service report into the Legal team in line with the close working arrangements between the two functions. The review of Legal services has also commenced and will look to develop a resilient and flexible shared team, with capacity aligned to the different functions and responsibilities of the service. This has already been progressed through the introduction of paralegal posts which aim to support transactional legal work which, prior to the appointments, would have been completed by higher graded solicitor level posts.

PHASE 2- Customer Services and ICT

- Work has continued on the recruitment to vacant posts within the service, which has seen recent success, with most new starters now in post. This has helped to deliver capacity for the services, driving forwards performance and the service delivery plans.
- Customer Services have reviewed the Fair Collection Charter and Council Tax Support Scheme and have identified prioritisation for the further policies to be reviewed. The reviews will align policies where possible across the councils, simplifying the application of policies for staff and also providing an opportunity to identify improvements or examples of best practice.
- A service transformation programme has been identified including process improvements (Garden Waste Review, and Revenues and Benefits processes) and changes to technology (such as hybrid mail and new telephony.) The process reviews have now commenced, specifications for the hybrid mail room have been developed, and the new telephony solution is being prepared for go live. These will all help to align the systems and processes across the councils, whilst also ensuring that we are delivering efficiencies through streamlined and automated processes.
- A Training Academy has been developed for customer services staff, identifying base training for all staff, to be supported by mentoring and networking opportunities, and this will be complemented by specialist training for specific service areas. This is due to be delivered from October 2022, with specialist training identified from November in line with the Councils' Performance Review Process.
- The ICT service has made progress on the delivery of the ICT plan which aims to align infrastructure and technology across the organisations, ensuring a stable and effective base to support officers and members in their work. End-point devices including phones, tablets and laptops have been identified and roll out of kit has now commenced. Preparations have also been made for the implementation of the new

remote Council desktop and the new file share solution (which will allow cloud access to files from any location for either council.)

- Business systems from across different service areas have now been identified for review, with a rolling programme developed to map out when systems will be reviewed in line with service need and readiness for implementation.

Performance

22. In addition to corporate level performance measures aligned to the Corporate Strategy, each service has local level performance measures to track productivity and impact. Local service performance indicators are reported twice a year to each council's relevant performance scrutiny panels. The meetings of the panels for 2022/23 are outlined below:
 - Overview and Scrutiny Performance Panel (Chorley), 22/09/2022 and 09/03/2023
 - Budget and Performance Panel (South Ribble), 12/09/2022 and 13/03/2023
23. All services reviewed their local performance indicators in early quarter one 2022/23. As a result of the development of shared services and implementation of the reviews for Customer Services and Digital, the opportunity was taken to align and consolidate the range of indicators across the services to reflect the new arrangements. Shared indicators are reported at each authority, pertaining to the individual council's performance.
24. The latest available performance information for outcome based performance indicators is set out at appendix B. There is currently no performance information available for ICT whilst their new systems, including help desk solution, are being implemented. Once the new systems are in place, the indicators will be brought online and included in future reporting.
25. There are currently 3 out of the 22 reported indicators which are off-target for either of the councils. An explanation and action plan for these indicators has been included within the appendix.
26. For Customer Services and Revenues and Benefits, additional performance information has been provided in relation to call wait times, abandoned call rates and calls answered within 90 seconds, which demonstrates steady improvements in performance from June- September. For example, at both councils, average call wait times have reduced by between 5-6 minutes within this time.

Risk Register

27. The following risk register provides a summary of the key risks for shared services, in addition to the actions and controls that are in place to mitigate the potential impact on the councils.
28. 4 risks are identified as **medium-risk** in relation to impact and likelihood, and 2 risks are identified as **low-risk**. The two highest risks are 'organisational disruption and impact on service performance' and 'staff uncertainty and impact on employee wellbeing.' These risks both have a matrix risk score of 9 which means that, across the shared services environment, the risks would be likely to occur and would have a

serious impact if no mitigating actions were taken. Many of the lower scored risks are mitigated by the established governance arrangements for shared services including the shared services agreement.

29. Risks remain relatively stable across shared services, with work progressing to support the delivery of actions including recruiting to vacant posts within the phase 2 services and developing the proposals and project plan for phase 3 of shared services. Further actions include the delivery of the new People Strategy, which will help to support staff wellbeing and development across both councils and shared services, including through the introduction of two 'development days' per year to secure time for personal and team development, and a review of reward and recognition. These are particularly important for shared services, where new teams have come together and will benefit from dedicated time to support team building and development, alongside recognition for the specific challenges of working in the shared services environment.
30. All risks will continue to be monitored as part of the shared services project and corporate risk registers, and any changes in risk will be captured through reporting to Shared Services Joint Committee.

Risk No. (Rnn)	Description	Controls in Place	Impact	Likelihood	Matrix Score	Actions Planned	Action Owner	Target Action Date
R1	Organisational disruption and impact on performance and service delivery	<p>Performance management mechanisms have been strengthened to ensure close corporate oversight throughout any shared services changes.</p> <p>A reviewed monitoring approach for Shared Services has been agreed by SSJC to allow for more frequent reporting on phase 2 of shared services.</p>	3	3	9	<p>Additional capacity is currently being recruited to for the Customer Services and ICT teams.</p> <p>A delivery programme for the future development of shared services will be developed with clear timescales and milestones, supported by the transformation team to minimise impact across the councils</p> <p>A risk assessment is to be conducted for each new service review in relation to customer/ operational impact</p>	Transformation	<p>Completed</p> <p>Completed</p> <p>Ongoing- November 22 for Property and Assets</p>
R2	Staff uncertainty and impact on workforce wellbeing	<p>Staff will be fully engaged and consulted throughout the changes, both informally and formally in line with the refreshed Change Policy.</p> <p>Regular pulse surveys are in place to monitor staff wellbeing and any issues.</p> <p>Engagement mechanisms including manager briefings to identify and address issues.</p>	3	3	9	<p>Induction and development plan being delivered for ICT and Customer Services in line with the implementation of the shared service models.</p> <p>Lessons learned will be incorporated into the delivery of future phases of shared services to reduce staff uncertainty and impact on wellbeing, this includes taking a more measured approach to shared services so that resources can be focused on supporting functions which are going through a shared services review.</p> <p>The People Strategy will introduce a series of initiatives to support wellbeing and morale including Development Days</p>	Project Team/ Transformation/ HR & OD	<p>Ongoing- December 2022</p> <p>Ongoing</p> <p>December 2023</p>

						which can be used for personal or team development, and a review of reward and recognition.		
R3	Wider strategic changes to local government structures	Both organisations are fully engaged and working proactively to understand the implications of local government reorganisation. Shared services helps to strengthen the strategic position of both councils and the ability to influence and shape change through greater scale.	3	2	6			
R4	Change in political control leading to a lack of cross party support	Arrangements specified in the shared services agreement including an extended agreement and exit arrangements.	3	2	6			
R5	Loss of sovereignty	Both councils retain political independence and decision making. Robust governance and clear protocols within the shared services agreement ensure that both councils maintain individual sovereignty.	3	1	3			
R6	Different levels of future budgets for shared services across both councils	Shared Services provides opportunities for continued savings for both councils. The shared services agreement	3	1	3			

		recognises committed budgets for each council.					
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Climate change and air quality

31. The work noted in this report does not impact the climate change and sustainability targets of the Councils Green Agenda and all environmental considerations are in place

Equality and diversity

32. This report has no equality or diversity implications.

Risk

33. Risk is outlined within the report.

Comments of the Statutory Finance Officer

34. There are no direct financial implications arising from this report. Shared Services costs and savings now account for a significant and growing part of both Councils budgets. This is monitored across the year and relevant costs are attributed to each Council.

Comments of the Monitoring Officer

35. There are no direct legal implications arising. The report is for information and noting.

Appendices

Appendix A- Service Development Objectives

Appendix B- Performance Indicators

Report Author:	Email:	Telephone:	Date:
Caroline Winstanley (Transformation Co-Ordinator)	caroline.winstanley@southribble.gov.uk caroline.winstanley@chorley.gov.uk		29.09.2022

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Service Development Objectives

Objective	Aim	Status	Update September 2022
All shared services			
Implement Shared Terms and Conditions across Chorley and South Ribble Councils	As around 50 percent of the workforce is now shared, the ambition is to expand the shared services terms and conditions across the workforce of Chorley and South Ribble Councils including non-shared staff.	In progress	<p>A plan and timetable have been developed for the roll out of the new terms and conditions starting with the Communities team and then progressing to other services based on factors such as car user need or size of service. Briefing sessions have been held with all staff to explain the new terms and conditions and process to be taken.</p> <p>Moving onto the new terms and conditions will help to align conditions across shared and non-shared staff and will offer benefits including an improved offer to staff.</p>
Transformation and Partnerships			
Further develop performance and programme management systems	To continue to develop the performance and programme management systems in relation to the new shared policies and frameworks that are now in place and ensure that they can provide robust management information.	In progress	<p>Further improvements to the shared programme management system have been identified based on drop-ins and conversations with staff. These have now been implemented to ensure a more user-friendly system, with improvements now being delivered on an ongoing basis.</p> <p>The next step for performance management is to review the reporting function to ensure that the right information is available to support effective service management and decision making.</p>

<p>Deliver HR transformation phase 2</p>	<p>To build on the implementation of the shared HR system by moving to the HFX payroll system and developing additional modules to enable full self-service and additional functionality.</p>	<p>In progress</p>	<p>A plan for the phase 2 delivery of the HR transformation project has been identified to establish additional modules for the shared HR system, which will support with effective establishment control and an integrated end-to-end solution for recruitment and induction. This will help to ensure that we are offering an excellent candidate experience and attracting talent to the organisations, whilst ensuring that processes are streamlined and automated where possible. Work is currently being undertaken to identify the requirements for the organisations for these modules, which will then allow solutions to be identified and implemented.</p> <p>The implementation of HFX (the time management system) is also being completed as part of this project, this is expected to be in place by the end of the year for Leisure services and will then be rolled out to Chorley and South Ribble.</p>
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Communications and Visitor Economy

<p>Create a tourism strategy for SRBC</p>	<p>To create a tourism strategy for South Ribble to set out the approach for developing the visitor economy and tourism offer.</p>	<p>Not started</p>	<p>To be progressed from September 2022- February 2023 in line with identified timescales.</p>
<p>Deliver shared events programme</p>	<p>To deliver the events programme as a shared team.</p>	<p>In progress</p>	<p>At South Ribble we have delivered the Leyland Festival and Music in the Park with preparations underway for A Taste of Leyland and the Christmas Lights Switch On.</p> <p>At Chorley, What's Your Story, Chorley? the 10k, Picnic in the Park, Chorley Flower Show have all been delivered.</p>

			Other events to be delivered on the programmes include Chorley Live, bonfire night, Remembrance Sunday and the Christmas festivities.
Deliver the internal communications strategy including new intranet	To create a shared approach to internal communications which uses best practice to improve staff engagement and understanding of organisational priorities.	In progress	The internal communications strategy was presented to the Senior Leadership Team in May for feedback, with next steps to create a timeline of activity. Work has also started on a new intranet and the service has recruited to an internal communications post that will help with delivery of the activity.
Governance			
Implementation of corporate admin process review	To review the administrative processes in corporate support to enable efficiencies and align processes across the service.	In progress	The review of administrative processes within corporate support has enabled the service to streamline their support offer including invoice processing and electoral support, automating processes where possible. A restructure of the service is currently being completed to review the structure in light of current vacancies within the team. Timescales for this will be carried out in line with the review of management capacity which is to be presented to both Councils in September 2022. This will then confirm the amount of senior management support required of the team.
Develop support offer for the Leadership Team	To support senior management capacity by developing a standardised support offer for the Leadership Team.	In progress	Initial work has started on identifying the expectations for senior management support. This is expected to be completed by the end of the calendar year in line with the review of management capacity.

<p>Legal and Procurement restructure</p>	<p>To develop a single operating model for Legal services, delivering improved service resilience.</p> <p>Upcoming vacancies in the Procurement team mean that there are also opportunities to reconsider the procurement structure to ensure that it can best meet the priorities of the organisations.</p>	<p>In progress</p>	<p>The procurement restructure has now been completed, with approval via Executive Member Decision and recruitment is currently being undertaken for the new posts. The selection process is expected to be completed in October. The review has resulted in savings to revenue budget of £11,699 in total, or £5,850 to each Council.</p> <p>The review of legal services is continuing to progress following the return of staff from maternity leave. This is to be aligned to the procurement restructure as the procurement team will report into the legal service under the new proposals, with recruitment expected to take place by the end of December.</p> <p>These reviews will align the structure of the teams with service priorities and demands, including the introduction of paralegal posts which was completed earlier in the year in order to provide capacity for transactional legal work which would previously have been completed by higher graded solicitor level posts.</p>
<p>Undertake a review of the Health and Safety policies and processes and align where appropriate</p>	<p>To ensure that best practice policies and processes are in place and standardised Health and Safety policies are applied where possible across the organisations.</p>	<p>In progress</p>	<p>A review into the Health and Safety policies has commenced focusing initially on high-risk areas and developing the Health and Safety culture across the organisations such as through Health and Safety working groups.</p>

Customer Services			
Objective	Aim	Status	Update September 2022
Review policies and processes	Align policies and processes to enable efficiencies, consider best practice and process improvements	In progress	<p>The Fair Collection Charter and Council Tax Support Scheme have been completed with training for staff rolled out, including through the councils' e-learning hub.</p> <p>Reviews into Discretionary Housing Payments Policy and the Customer Care Policy have been presented to SMT in September and will now progress to member briefings for approval.</p> <p>The remaining policies are set out below and are being progressed as Priority 1 and Priority 2:</p> <ul style="list-style-type: none"> - NNDR (Business Rates Discretionary Rate Relief) Priority 1) - Council Tax Local Discounts Premiums and Exemptions Policy (Priority 1) - Exceptional Hardship Policy (Priority 2) - Council Tax Discretionary Hardship Policy (Priority 2)
Review duty officers	To review duty officers across front facing 'services to ensure customers can access specialists in key front facing areas in line with the principle established in the management stage of the review.	In progress	To be delivered in line with the Customer Care Policy which is currently being presented for briefings and approval.
Create a shared customer services culture	Both councils have a similar customer services culture and standards but this should be aligned where possible to enable staff to deliver a consistent customer experience across both councils	In progress	To be delivered based on Customer Care Policy and through the Training Academy for all staff. The Training Academy has now been identified with a programme being developed in line with service and individual needs.

Review opening hours	To consider if opening hours should be reviewed to reflect service levels post-pandemic and in line with the new service model. This could enable efficiencies and simplify working rotas across the councils	Not started	Opening hours are likely to be considered at a later date due to the current pressures on service delivery, call volumes and the work to further develop digital services which will be taking place across the service.
Develop a service transformation programme	To enable efficiencies to be delivered across the service and support the customer services vision. Staff development would be delivered in line with the transformation programme and new service model including individual development reviews.	In progress	A service transformation plan has been identified based on system and process changes and training and service development. This is set out in the table below:

Item	Description
Customer Services Transformation	<p>Work led by the Customer Services Transformation Lead to drive forward improvements and development of services. This currently includes:</p> <ul style="list-style-type: none"> - Garden Waste Review currently being undertaken to identify options and improvements for the service to help to ensure efficiency. - Review of Revenues and Benefits processes is currently being progressed in line with the Capita software to ensure that processes are streamlined and automated wherever possible. - Work has started on developing a calendar of key events for the service to ensure that capacity can be used effectively to meet different service needs throughout the year.
Technology changes	<p>Changes to technology to be delivered as part of the ICT Service Plan to ensure that staff have the technology needed to support service delivery and maximise the use of technology to support efficient services.</p> <p>This includes:</p> <ul style="list-style-type: none"> - Review of hybrid mail and virtual mail room for scanning and indexing incoming post (work has started on this project, including finalising the specification for hybrid mail. This will look to introduce improvements for both councils to offer new

	<p>services such as large prints, colour and specialised services for licensing and elections. The virtual mail room for incoming mail is currently due to go live.)</p> <ul style="list-style-type: none"> - Telephony (a review into shared telephony is expected to be completed by the end of the calendar year, in line with ICT capacity)
Training Academy	<p>Staff training to support and embed service transformation to include:</p> <p>Training Academy: training programme supported by mentors and networking opportunities to offer generalist customer services training, including customer care and communication, to all customer services staff. This is to be delivered from October onwards.</p> <p>Specialist training: training in specialisms to be delivered through the Councils' Performance Review Process, with individual training identified for staff as appropriate to support personal and service development. This is to be progressed from November onwards in line with the next round of the Performance Review Process.</p> <p>Team development/ team building: to be delivered through the annual development days introduced as part of the People Strategy</p>

ICT			
Objective	Aim	Status	Update September 22
Consolidate the management of line of business applications including procurement and budgets within the ICT service	To enable greater integration and interoperability between systems	Complete	This is now completed with all systems managed within the ICT service aside from the Finance system which has joint ownership between Finance and ICT. A review of business systems across the organisation is currently being delivered as part of the ICT Plan to identify improvements.
Consolidate post	To ensure a consistent approach,	Complete	This is now complete.

<p>room services and the procurement of paper and office stationery within the ICT service</p>	<p>minimising impact on business continuity and digital service functions</p>		<p>Office services now sits within Corporate Support- the admin review for the Corporate Support service has reviewed process for stationery and aligned this across councils</p> <p>Customer Services are exploring options for Hybrid Mail with a specification now developed. This will allow for mail to be sent automatically for each council, with the review identifying additional functions to improve service delivery such as colour mail and specialist printing for elections/ licensing.</p>
<p>Review paper-based information across the authority and identify digitisation requirements for the authorities.</p>	<p>To ensure a consistent approach, minimising impact on business continuity and compiling will all relevant policies and procedures.</p>	<p>In Progress</p>	<p>Work has started on digitising paper records with the estates team at South Ribble and Legal services at Chorley. Priority services for future digitisation are being identified as part of the ICT plan with work with services taking place to define requirements and begin work.</p>
<p>Review the office services role within the structure</p>	<p>To consider the office services and administration functions that are currently carried out in the ICT team for South Ribble</p>	<p>Complete</p>	<p>The office services role has now moved to the Corporate Support service as part of a review of their administrative processes.</p>
<p>Review skills and development</p>	<p>To consider training needs within the ICT service, supporting the development of staff and ensuring the flexibility of the service to adapt to future changes.</p> <p>There are several apprenticeship, graduate and development posts within the structure which will need consideration for development needs alongside other posts.</p>	<p>In Progress</p>	<p>Recruitment for all posts has progressed well with a full team expected to be in post by the end of September. 1:1 development reviews with all staff are being repeated to capture new starters and are expected to be completed by the 11 October. This will help to inform training and development needs for the service moving forwards.</p> <p>Training has been identified for staff on the new technology and business systems.</p> <p>As there are many new members of the team, whole team training will take place as part of the upcoming 'Development Days' being</p>

			delivered as part of the Councils' People Strategy.
Develop a transformation action plan	To deliver a single operating model across shared services, maximising the sharing of resources and capacity through the alignment of systems, processes and policy as far as possible	In Progress	An ICT plan has been developed to drive forwards the development and alignment of infrastructure and technology across the councils. This now has dedicated programme management support in place to drive forwards delivery. Separate actions for this are outlined below:

Action	Aim	Timescales	Progress
Replacement of all infrastructure, network and end-point devices	To ensure that infrastructure, network and devices are fit for purpose, aligned to both councils' digital ambitions and enabling the hybrid working model. This will help to create a consistent user experience across shared services.	<ul style="list-style-type: none"> a) Roll out of mobile kit- phones, tablets, laptops (September-October) b) Roll out of Citrix desktop (October) c) Move to Sharepoint and Teams file storage (November) d) Roll out of desktops (December/ January) 	End point devices have been identified and criteria developed based on types of workers aligned to the Workplace Strategy. Service areas have identified the type of workers in their teams (hybrid, office based etc.) to enable the roll out of devices which has now commenced starting with mobile kit.
Deliver a rolling programme of business system changes	To ensure that staff have the best systems in place to do their jobs, that business systems across the organisation are used and managed in a consistent way and to make sure that we are making best use of technology and full functionality.	September 2022- March 2023	Business systems from services across the organisations will be reviewed, with a rolling programme now identified to map out when systems will be reviewed in line with urgency and readiness of service.

Shared help desk and telephony	To support the alignment of systems across shared services.	TBC	The shared telephony system has progressed with the new solution identified. Work will now take place to identify workflows and how KPI's are monitored prior to the implementation of the system. This will be rolled out on a phased basis to minimise risk of disruption, starting with Leisure services.

			Chorley				South Ribble			
Indicator	Polarity	Target	Q1 2021/22	Q1 2022/23	Symbol	Trend	Q1 2021/22	Q1 2022/23	Symbol	Trend
Audit and Risk										
Internal Audit - % of Audit Plan Completed	Bigger is better	23%	8%	28.6%	★	Better than Q1 2021/22	Not reported	28.6%	★	Comparison not available
Internal Audit - % Satisfaction level (assignment level)	Bigger is better	90%	100%	97%	★	Worse than Q1 2021/22	100%	97%	★	Worse than Q1 2021/22
Number of accidents reported to Health and Safety from work related activity	Smaller is better	8	Not reported	5	★	Comparison not available	15	8	★	Better than Q1 2021/22
Communications and Visitor Economy										
% of email open rates within the Attain System	Bigger is better	50%	55.47%	58.2%	★	Better than Q1 2021/22	63.27%	57.14%	★	Worse than Q1 2021/22
Social media engagements	Bigger is better	CBC-85624/SRBC-0	CBC-85,624/SRBC 0	86,973	★	Better than Q1 2021/22	0	47,964		Baseline for 2022/23
Number of visitors to Astley Hall (Ticket Sales)	Bigger is better	Baseline	New for 2021/22	1917	★	Comparison not available				
Governance Services										
% valid postal/proxy vote applications processed within 3 working days	Bigger is better	95%	100%	100%	★	Same as Q1 2021/22	New for 2021/22	100%	★	Comparison not available
% FOI (including EIR and DPA) requests responded to on time	Bigger is better	90%	91.97%	56.32%	▲	Worse than Q1 2021/22				

% legal files opened within 5 days	Bigger is better	90%	93.91%	95.3%	★	Better than Q1 2021/22	New for 2021/22	85%	▲	Comparison not available
% prosecution / civil litigation files reviewed within one month of receipt	Bigger is better	90%	100%	100%	★	Same as Q1 2021/22	New for 2021/22	100%	★	Comparison not available
Finance										
Compliance with The Prudential Code	Bigger is better	100%	100%	100%	★	Same as Q1 2021/22	100%	100%	★	Same as Q1 2021/22
Statutory Grant Claims and Returns to be submitted on time	Bigger is better	100%	100%	100%	★	Same as Q1 2021/22				
% variation between the forecast outturn at month 6 and the actual outturn at month 12	Smaller is better	5%	0%	0.86%	★	Worse than Q1 2021/22	Not reported	1.5%	★	Comparison not available
Transformation and Partnerships										
% Performance information provided by quarterly deadline	Bigger is better	85%	73%	81%	●	Better than Q1 2021/22	Not available	74%	▲	Comparison not available
% Corporate Strategy projects on track / delivered – council-wide	Bigger is better	90%	92%	86%	●	Worse than Q1 2021/22	79%	93%	★	Better than Q1 2021/22
Total visits to the Chorley Council Website	Bigger is better	100,000	451,060	410,148	★	Worse than Q1 2021/22				
% of service website pages overdue	Smaller is better	15%	14.2%	8.7%	★	Better than Q1 2021/22				
% Satisfaction with OD activities	Bigger is better	95%	95%	95%	★	Same as Q1 2021/22	95%	99%	★	Better than Q1 2021/22

% minutes of the Chorley and South Ribble Partnership published in 10 working days	Bigger is better	95%	New for 2022/23	100%	★	Comparison not available	New for 2022/23	100%	★	Comparison not available
% of shared services development actions on track	Bigger is better	70%	75%	93.75%	★	Better than Q1 2021/22	75%	93.75%	★	Better than Q1 2021/22

Customer Services

Indicator	Polarity	Target	August 2021/22	August 2022/23	Symbol	Trend	September 2021/22	September 2022/23	Symbol	Trend
Chorley										
Percentage of Council Tax collected	Bigger is better	2021/22 outturn	46.13%	46.11%	●	Worse than Q1 2021/22	55.10%	55.34%	★	Better than 2021/22
Percentage of Business Rates (NNDR) collected	Bigger is better	2021/22 outturn	41.11%	42.88%	★	Better than Q1 2021/22	50.66%	51.97%	★	Better than 2021/22
South Ribble										
Percentage of Council Tax collected	Bigger is better	2021/22 outturn	47.18%	47.67%	★	Better than Q1 2021/22	56.05%	57.10%	★	Better than 2021/22
Percentage of Business Rates (NNDR) collected	Bigger is better	2021/22 outturn	42.97%	35.94%	★	Better than Q1 2021/22	51.97%	57.05%	★	Better than 2021/22

Indicator	Chorley				South Ribble			
	June 2022/23	July 2022/23	August 2022/23	September 2022/23	June 2022/23	July 2022/23	August 2022/23	September 2022/23
% calls abandoned	46.80%	39.81%	33.30%	21.89%	37.13%	39.81%	27.38%	24.34%
% calls answered within 90 seconds	7.4%	11.36%	23.49%	30.28%	11.43%	7.78%	27.08%	25.29%

	Chorley				South Ribble			
Indicator	June 2022/23	July 2022/23	August 2022/23	September 2022/23	June 2022/23	July 2022/23	August 2022/23	September 2022/23
Average wait time before calls answered	00:10:41	00:08:58	00:06:45	00:04:58	00:12:29	00:09:30	00:07:15	00:06:52

Performance overall for Customer Services and Revenues and Benefits at both councils is showing a positive improving trend over the last few months and it is expected that further improvements will be seen following the full recruitment and training of staff within the service. There are currently some differences in performance between the councils in some areas which are likely in response to local demand such as the Council Tax Rebate and this continues to be managed proactively such as through third party agency support where required and the continued training of new staff.

OFF-TRACK INDICATORS						
Indicator	Polarity	Target	Q1 2021/22	Q1 2022/23	Symbol	Trend
Chorley						
% FOI (including EIR and DPA) requests responded to on time	Bigger is better	90%	91.97%	56.32%	▲	Worse than Q1 2021/22
Reason below target	The FOI co-ordinator has been on long-term leave, with FOIs being covered by the rest of the team.					
Action Required	Additional resources from within the council have been identified to manage the FOI coordination which has helped to manage some of the backlog of work and new requests. Performance is expected to improve over the next quarters.					
South Ribble						
% legal files opened within 5 days	Bigger is better	90%	<i>New for 2021/22</i>	85%	▲	<i>Comparison not available</i>
Reason below target	The reduction in performance aligns with the ending of a temporary appointment to cover maternity cover, and the return to work from maternity leave of a full time member of staff. Leave commitments of the returning staff member led to a short term lack of capacity.					
Action Required	No actions are necessary, 85% performance remains good, but the performance against this indicator will continue to be monitored.					
% Performance information provided by quarterly deadline	Bigger is better	85%	Not available	74%	▲	<i>Comparison not available</i>
Reason below target	The performance management framework has achieved significant improvements in overall performance culture. Significant improvements have been achieved and overall 74% is a good level of compliance.					
Action Required	Further prompts and reminders are being provided to officers to further reinforce the process within the performance management framework, supporting and embedding a strong performance culture.					

