Shared Services Joint Committee

Tuesday, 21st February 2023, 6.00 pm
Council Chamber, Town Hall, Market Street, Chorley, PR7 1DP

Agenda

1	**Apologies for Absence**	
2	**Minutes of meeting Wednesday, 30 November 2022 of Shared Services Joint Committee**	(Pages 3 - 4)
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 Future Options**	(Pages 5 - 10)

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

5	**Shared Services Monitoring Report**	(Pages 11 - 38)

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

6	**Any urgent business previously agreed with the Chair**	

Chris Sinnott
Chief Executive

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Minutes of	**Shared Services Joint Committee**
Meeting date	**Wednesday, 30 November 2022**
Members present:	Councillor Alistair Bradley (Chair), Councillor Paul Foster (Vice-Chair) and Councillors Margaret France, David Shaw and Karen Walton
Members present virtually (non-voting)	Councillors Alan Cullens and Peter Wilson
Officers:	Chris Sinnott (Deputy Chief Executive) and Nina Neisser (Democratic and Member Services Officer)

12 Apologies for Absence

Apologies of absence were received from Councillors Aniela Bylinski-Gelder, Margaret Smith and Kim Snape.

Councillors Damien Bretherton and Terry Howarth attended as substitutes.

13 Minutes of meeting Monday, 17 October 2022 of Shared Services Joint Committee

Resolved: (For: 5 Abstain: 4)

For: Councillors Bradley, Foster, France, Shaw and Walton

Abstain: Councillors Bretherton, Cullens, Howarth and Wilson

That the minutes of the meeting of the Shared Services Joint Committee held on Monday, 17 October 2022 be approved as a correct record.

14 Declarations of Any Interests

None received.

15 Exclusion of Press and Public

Resolved: (unanimously)

That the press and public be excluded from the meeting for the following item of business on the grounds that it involves the likely disclosure of exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972.

16   Shared Property and Assets Service Review

Chris Sinnott, Deputy Chief Executive presented the confidential report of the Director of Change and Delivery which provided information on the shared services review for Property and Assets to progress the delivery of phase 3 of shared services as agreed by both councils in February 2022. The report outlined the principles and scope of the review as well as findings and the recommendations for the service.

The Committee supported the proposals and discussed the costings, structure and timescales. Members requested that staff and the Shared Services Joint Committee be kept informed throughout the process.

Resolved (unanimously):
That subject to Executive Member Decision, the proposals for the new service structure and service development plan commence to formal consultation across both councils.

Chair   Date

South Ribble Borough Council | Chorley Council

WORKING TOGETHER

Report of	Meeting	Date
Director (Change and Delivery)	Shared Services Joint Committee	Tuesday, 21 February 2023

Shared Services Future Options

Is this report confidential?	No

Is this decision key?	No

Purpose of the Report

1. To set out potential options for the future development of shared services.

Recommendations to Shared Services Joint Committee

2. To review and discuss the options as set out in the report and provide feedback to inform further development and proposals.

Reasons for recommendations

3. To provide a starting point for any further development of proposals for future sharing.

Other options considered and rejected

4. Several potential options are set out within the report for consideration and discussion by members.

Background

5. Building on the long-standing shared services arrangements for Finance and Risk and Audit services, Chorley and South Ribble Councils have engaged in a full programme of shared services delivery from 2019-2023 as outlined below:

   - **Phase 1 (2019-2020):** Shared Policy and Governance directorate
   - **Phase 2 (2020-2021):** Shared Senior Management Team, ICT and Customer Services
   - **Future development (2022):** principles for shared services refreshed alongside shared director roles for Change and Delivery and Future Investments. A shared pest control service
   - **Review of management capacity (2022):** creating several shared Head of Service roles
   - **Phase 3 (2022-2023):** Shared Property and Assets Service

6.   The shared services programme has led to a shared workforce of around 50% for the two councils.

7.   Following the implementation of phase 3 of shared services in February 2023, options for the future of sharing between the councils should be considered.

Options for sharing

8.   Several key options for shared services have been considered within this report, considering the potential benefits and issues for each option:
    A. **Opportunistic** - to continue to deliver shared services in line with the principles agreed at the last review of the future development of shared services in 2022
    B. **Full service review** - to identify a full service to be reviewed as a 'phase 4' of shared services
    C. **External opportunities** - to consider other alternatives to sharing outside of Chorley and South Ribble councils, including different partnership arrangements with other councils and organisations
    D. **To pause further shared services-** to pause any further delivery of new shared services for a set time period i.e. 6 months.

9.   Shared services has generated savings on excess of £1.6m across the two councils, provided the ability to share resources quickly to support business continuity and adapt to changing service demands, and provided additional technical expertise, skills and services across the organisations. The options set out should therefore also be considered within the context of the wider benefits and issues of sharing services across the councils, including the potential to build resilience, share expertise and generate savings, whilst maintaining performance and supporting staff through organisational change.

A. Opportunistic approach

10.   In 2022, both councils agreed to consider the future expansion of shared services by identifying areas where there are the greatest opportunities and benefits for sharing. This led to the shared services review for Property and Assets, based on recruitment challenges within the service and the opportunity to create a more resilient and sustainable shared team.

11.   The council is committed to continuous improvement and supporting staff development. As part of this work, Heads of Service will be working with their teams to identify any current or potential future opportunities to strengthen skills or resilience through sharing of functions.

12.   Any opportunistic areas for sharing identified by the Heads of Service in this way would be considered in line with the principles for the future development of shared services agreed by both councils and would provide a focus on areas where there is a need for change based on:

    • Lack of capacity due to current structure, changing service demands or recruitment challenges

- Temporary or informal sharing arrangements which could be formalised to provide greater sustainability moving forwards
- New priorities that have been identified in the service area which mean that a sharing arrangement would be beneficial for the councils
- Potential for savings or efficiencies to be delivered
- Area for common need/ potential for sharing to support one council to deliver a new function whilst maintaining or improving performance for the other

13. Potential areas for sharing could include functions with a shared Head of Service, for example Operational Assets (shared management of key assets and options for a joint asset management approach) and Environmental Health (sharing of skills, expertise and resilience.) Other opportunities for sharing could include, for example, Spatial Planning (linked to the Local Plan management and development) and Building Control (to build skills and our 'grow our own' approach.)

14. This option would provide the flexibility to progress opportunities for sharing where there could be the greatest benefit and deliver change without a full shared services review process. A coordinated approach to delivering shared functions would help to ensure that opportunities and sharing arrangements work well together across the organisation. However, taking a more piecemeal process could make it more difficult to achieve large scale transformation across the organisation and could lead to some uncertainty on what the future of shared services looks like.

15. If an opportunistic approach were adopted, proposals would be presented to the shared services joint committee and then relevant individual council decision maker for consideration and approval prior to any implementation.

B. Full service review

16. A full service review could be carried out as phase 4 of shared services, identifying a particular service to review and implementing a new shared structure and operating model. There are several different services that could be considered for phase 4 including planning policy, enforcement and facilities management. A full assessment would be required to set out detailed proposals and benefits.

17. This option would further extend shared services and build on the shared line management arrangements already in place, however it would need to be balanced against organisational resources and stability following a period of extensive change. Focusing on specific areas for sharing of whole services could also make it more difficult to progress sharing of other functions where opportunities are identified.

C. External opportunities

18. There are several opportunities for sharing with external partners which could be considered further, either through a formal structure or sharing arrangement, or through different forms of partnership working to deliver joint services across the boroughs.

19. Some options could include:

- **Sharing with other local authorities**: to explore a shared services arrangement with other nearby local authorities. Many shared services arrangements across the country form a partnership of three or more councils, although this is normally in the delivery of certain 'back-office' services, such as ICT, rather than management roles and full shared services structures.

- **Vertical sharing:** most shared services partnerships are 'horizontal', involving councils at the same level of local government. There are some cases of sharing arrangements that are 'vertical.' One example of this is at Gloucester City Council which works closely with Gloucestershire County Council and shares several back-office functions.

- **Working with other public sector organisations:** some councils have developed shared capacity with local NHS bodies to develop a joint approach to public health. For example, Suffolk Coastal and Waveney developed a key senior post with their local clinical commissioning group to reduce duplication and more closely align strategies and delivery to a shared vision for health. In more complex arrangements involving whole service or directorates, there is the risk of any changes to the operating environment of partners e.g. changes to national health strategy, having a large impact on the council and any other partners involved.

- **Different sharing arrangements**: there are several options for the management of any sharing or joint working arrangements including
  - Mergers/ separate bodies- merging a service within a host authority or as a separate external body
  - Contractual- where one organisation provides a service for the other organisation
  - Collaborative or joint working- where two or more authorities collaborate on specific projects, for example tendering exercises
  - Pooling of resources- where organisations share facilities and assets for example, IT, training or office space

20. Chorley and South Ribble both have existing partnership arrangements in place to deliver services, such as the payroll arrangements with Blackpool Council. Particular areas of focus for any further investigation could be based around the key priorities for the councils or large scale issues in areas such as health integration and housing delivery. This option would build on established partnership relationship by formally sharing resources to address strategic issues, however it would rely on cooperation, buy-in and policy alignment from our partners.

21. Partners across Chorley and South Ribble have already identified and aligned key priorities within the shared Chorley and South Ribble Partnership and formal sharing of resources could provide the opportunity to have a 'greater reach' and deliver beyond the council's current remit to have a larger impact on outcomes for local communities.

22. There are several different approaches which could be taken to working with external partners, some of which would require significant time and resources to further develop and any proposals would be dependent on the buy-in and sustained support

from partners, who could be operating within different circumstances, financial constraints or governance frameworks to Chorley and South Ribble.

D. Pause further shared services

23.   The final option is to pause the further expansion of shared services for a set period i.e. 6 or 12 months, to then be revisited at this later time. This would provide additional time for the councils to adjust and reflect on the new sharing arrangements without further change but could lead to opportunities to address current or growing challenges being missed. A pause could also lead to uncertainty around the future direction of sharing across the two councils, although this could be partially mitigated by identifying a set time period for review.

Conclusion

24.   The options outlined above are not an extensive or exhaustive list but intend to provide a starting point for discussion and further development on the way forward for shared services. Options could also be combined, for example, by progressing opportunistic areas for sharing whilst exploring external sharing with other organisations.

25.   Members are asked to provide their thoughts and comments in respect of the suggestions and options outlined.

Climate change and air quality

26.   The work noted in this report has no impact on the Councils' Carbon emissions and the wider Climate Emergency and sustainability targets of the Councils.

Equality and diversity

27.   Any proposals for sharing, if brought forward, would be considered alongside an equality impact assessment.

Risk

28.   Several of the risks and issues associated with the different options have been considered within the narrative of the report. Members should consider risk and issues as part of their discussion and consideration of options.

Comments of the Statutory Finance Officer

29.   There are no direct financial implications at this stage. For any further changes to Shared Services, the financial implications would need to be considered on the individual merit of each proposal. Previous reviews continue to provide considerable savings to both Councils.

Comments of the Monitoring Officer

30.   The report is for consideration. There are no direct legal implications at this stage. Depending on what the agreed way forward is there may be a need to update the agreement between the two councils.

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WORKING TOGETHER

Report of	Meeting	Date
Director (Change and Delivery)	Shared Services Joint Committee	Tuesday, 21 February 2023

Shared Services Monitoring Report- February 2023

Is this report confidential?	No

Is this decision key?	No

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

Background

6.   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.

7.   The phase 2 shared services were implemented in November 2021 for ICT and March 2022 for Customer Services.

8.   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 2023/24 to provide a more in-depth overview of benefits realisation and best practice.

9.   Future reporting will also include the recently implemented phase 3 Property and Assets service which was implemented on the 1 February this year.

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
- Property services team which is split 60% CBC and 40% SRBC
- Services that relate entirely to one Council including Chorley Council 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 February 2023. 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.   The Pulse Surveys help to provide a general indication of satisfaction over a period of time and help to identify and address any key issues which need to be targeted and resolved. Staff satisfaction and engagement is also informally measured throughout the year through regular staff forums and employee engagement groups.

16.   93 members of staff completed the survey which represents just under half of all shared services staff. The table below outlines the percentage agreement across all survey questions, showing that whilst satisfaction has dropped slightly since the last survey in September 2022, it still remains higher than in June last year. This could be due to a slight drop in the number of people completing the survey.

Question	February 2023	September 2022	June 2022
I understand how my service contributes to delivering the priorities of the council/both councils.	94.62%	96.2%	87.5%
I understand my role within my directorate/council/shared services.	88.17%	92.5%	86.8%
I have the skills and knowledge needed for my role	89.25%	88.7%	89.0%
Overall, I am happy with my job	64.5%	71.7%	58.1%

17.   In the June 2022 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. A comparison between the survey in June 2022 and the survey in September indicated a significant improvement across the service, including a 39.4% increase in those who agree or strongly agree that they are happy with their job. This level of satisfaction has remained relatively high, at 60.53% in February 2023.

Question	February 2023	September 2022	June 2022
I understand how my service contributes to delivering the priorities of the council/both councils.	94.74%	95.1%	74%
I understand my role within my directorate/council/shared services.	81.57%	87.8%	74%
I have the skills and knowledge needed for my role	84.21%	85.4%	84%
Overall, I am happy with my job	60.53%	63.4%	24%

18.   Whilst it is difficult to compare to other surveys with different questions, the findings from the Pulse Survey are roughly in line with other public sector organisations, for example the Civil Service People Survey in 2021 found a mean 'employee engagement index' of 62.65 out of 100 and the NHS Staff Survey found an overall morale score of 5.8 out of 10.

19.   Open feedback has included key themes such as:

- **Staff enjoy working with their colleagues**, taking part in organised staff social activities, and the 'team spirit' across services.
- **Improvements to ICT,** including new telephony and equipment roll out, have helped staff to work effectively in their roles. There are still some issues with particular pieces of software and line of business systems with ICT progressing a plan to review these.
- **Improved capacity in teams**, especially IT and Customer Services. 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 service areas. Whilst capacity has been increased in relevant service areas, teams are still handling high workloads due to high service demands and this, in turn, can make it difficult for teams to work collaboratively and support other service areas effectively.
- **Some areas of communication could be improved** including ongoing change management i.e. keeping officers up to date on new processes that are being implemented. A new internal communication action plan is currently being finalised ready for implementation which will support senior managers and teams in communicating effectively across the organisation.

20.   Findings of the survey are shared with staff and fed back to Directors and Heads of Service to identify actions to target issues identified and to further embed and grow high staff satisfaction and engagement.

Service Level Development

21.   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.

22.   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 are now progressing well against their objectives despite initial challenges relating to capacity and temporary service demands, such as the national Council Tax Rebate scheme.

23.   The full service development objectives and status update for 2022/23 are available in appendix A.

24.   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 programme is now in place for the roll out of the new Terms and Conditions in 2023/24 to all staff across both councils to be led by the senior managers for each service. This will align the conditions across shared services, and non-shared teams, and will offer benefits including an improved offer for staff.
- Work has continued on the delivery of phase 2 of the HR transformation project including the roll out of HFX time management systems and testing for the end-to-end recruitment module. 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.
- The events programme for 2022/23 has now been successfully completed, with work starting on preparations for events in 2023/24.
- A tourism strategy has been drafted for South Ribble to develop the approach for developing the visitor economy and tourism offer within the borough. The strategy will now progress for members to review.
- New Health and Safety policies have now been developed and rolled out to staff including manual handing, display screen equipment and lone-working policies.
- The review of procurement and legal services has now been completed, with remaining vacancies in the team currently being back-filled.
- The structure for the Corporate Support team has been reviewed in light of vacancies within the team and to realign capacity to the new Chief Executive, Senior Management team and the Executive Leaders. Recruitment has now been successfully completed.

PHASE 2- Customer Services and ICT

- Work has continued on the recruitment to vacant posts within Customer Services and this 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. A new training officer is currently being recruited to for Customer Services to support the training and development of the team, including for new and apprentice staff. There remains several vacancies within the ICT team, with a plan now being developed to consider alternative options in light of difficulties with recruitment.
- Customer Services have reviewed the Customer Access Policy and Discretionary Housing Payments Policy which are now being rolled out to staff. Both policies have been reviewed to ensure that they are clear and easy to understand for all customers, with the Discretionary Housing Payments Policy making it easier for residents who are most in need to access support.
- Process improvements have continued for the customer services team, including a reviewed process and proactive direct debit drive for garden waste renewal and work taking place to improve and automate processes on the revenues and benefits system.
- 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 now been rolled out to most staff and is expected to be completed by the end of February 2023.

- Business systems from across different service areas have now been identified for review, with a rolling programme now being delivered in line with service need and readiness for implementation.

Performance

25. 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

26. 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.

27. 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.

28. For Q3 2022/23 performance has been high across the services and out of 31 indicators across both councils, there are only 4 indicators off-target and all of these fall within the 5% threshold. The majority of indicators are also performing the same as or better than Q3 2021/22.

29. 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-January.

Risk Register

30. 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.

31. 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 'organisandal 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.

32. Risks remain relatively stable across shared services, with work progressing to support the delivery of actions including the delivery of the new People Strategy which will help to support staff wellbeing and development across both councils and shared services staff, continued recruitment to new/ vacant posts to support capacity within the ICT and Customer Services, and a report on options for the future development of shared services to be presented to Shared Services Joint Committee to agree an aligned approach across both councils moving forwards.

33. 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	Performance management mechanisms have been strengthened to ensure close corporate oversight throughout any shared services changes. A reviewed monitoring approach for Shared Services has been agreed by SSJC to allow for more frequent reporting on phase 2 of shared services.	3	3	9	Additional capacity is currently being recruited to for the Customer Services and ICT teams, including recruitment to vacant posts and a new training officer for Customer Services to support training and development. 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 A risk assessment is to be conducted for each new service review in relation to customer/ operational impact Review of management capacity to provide additional senior management resource at Head of Service Level to support shared Director team.	Transformation	Ongoing – April 2023 Completed Completed Completed
R2	Staff uncertainty and impact on workforce wellbeing	Staff will be fully engaged and consulted throughout the changes, both informally and formally in line with the refreshed Change Policy. Regular pulse surveys are in place to monitor staff wellbeing and any issues.	3	3	9	Training and development plan being delivered for Customer Services in line with the implementation of the shared service model. Lessons learned will be incorporated into the delivery of future phases of shared services to reduce staff uncertainty and impact on wellbeing, this includes	Project Team/ Transformation/ HR & OD	Ongoing-December 2023 Ongoing

						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. The People Strategy will introduce a series of initiatives to support wellbeing and morale including Development Days which can be used for personal or team development, and a review of reward and recognition.		December 2023
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	Options on future of shared services to be considered at Shared Services Joint Committee in February 2023		February 2023

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 recognises committed budgets for each council.	3	1	3			

Equality and diversity

34.   This report has no equality or diversity implications.

Risk

35.   Risk is outlined within the report.

Comments of the Statutory Finance Officer

36.   There are no direct financial implications arising from this report. Shared Services costs and savings represent a key element within the MTFS of each Council. This is monitored in year and relevant costs are attributed to each Council.

Comments of the Monitoring Officer

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

Appendices

Appendix A- Service Development Objectives
Appendix B- Performance Indicators

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Service Development Objectives

Objective	Aim	Status	Update February 2023
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	A programme is now in place for the rollout of the new terms and conditions over 2023/24 across the organisations. This will be led by senior managers for each service. 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, helping to support recruitment and retention.
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	Complete	Further improvements to the shared performance management system have been identified based on drop-ins and conversations with staff. These have now been implemented, alongside an improved reporting function. This has developed a more user-friendly system and ensured that the right information is available to support effective service management and decision making. Improvements are now being delivered on an ongoing basis through continuous improvement.

	management information.		
Deliver HR transformation phase 2	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.	In progress	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 has now started on developing the new recruitment module, with testing taking place for functionality and to ensure a streamlined process. The implementation of HFX (the time management system) is also being completed as part of this project, and is currently at the stage of being rolled out to staff.
Communications and Visitor Economy			
Create a tourism strategy for SRBC	To create a tourism strategy for South Ribble to set out the approach for developing the visitor economy and tourism offer.	In progress	A draft Tourism Strategy has been identified and shared with the Senior Management Team and Leader Briefing. This will then progress to Cabinet for approval. The new strategy will ensure a strategic approach and future vision to help develop and embed the visitor economy and tourism offer at South Ribble.
Deliver shared events	To deliver the events	Complete	The events programme for 2022/23 has now been successfully completed. At South Ribble we have delivered the Leyland Festival, Music in the Park, A Taste of Leyland and the Christmas Lights Switch On.

programme	programme as a shared team.		At Chorley, What's Your Story, Chorley?, the 10k, Picnic in the Park, Chorley Flower Show, Chorley Live and Christmas festivities have all been delivered. Other events have included bonfire night and Remembrance Sunday.
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 and timeline for activity has been drafted. Work is progressing to deliver a new staff intranet, with a working version currently being finalised to test with staff. This will help to ensure that staff have access to the right information that they need to work effectively and will replace the current intranet which is now outdated. Work is also taking place to relaunch Yammer, which is acts as a form of workplace social media for colleagues to share information and celebrate successes across the organisation.
Governance			
Implementation of corporate admin process review	To review the administrative processes in corporate support to enable efficiencies and align processes across the service.	Complete	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 has now also been completed to review the structure in light of vacancies within the team and to realign support and capacity for the Chief Executive, Senior Management team and Executive Leaders.
Develop support offer	To support senior	In	A suite of options have been developed to set out the expectations for

for the Leadership Team	management capacity by developing a standardised support offer for the Leadership Team.	progress	senior management support from the corporate support team. This is expected to be completed over the next few months once the new Heads of Service are in post.
Legal and Procurement restructure	To develop a single operating model for Legal services, delivering improved service resilience. 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.	Complete	The procurement restructure has now been completed, with approval via Executive Member Decision and recruitment is currently being undertaken for the new posts. The review has resulted in savings to revenue budget of £11,699 in total, or £5,850 to each Council. The review of legal services has now been completed and the service is currently in the process of backfilling vacancies within the team.
Undertake a review of the Health and Safety policies and processes and align where appropriate	To ensure that best practice policies and processes are in place and standardised Health and Safety policies are	In progress	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. The roll out of key policies which apply to all staff have now taken place

	applied where possible across the organisations.		including manual handling, display screen assessment and lone-working. Other health and safety policies which apply to specific teams are now being developed and finalised.

Customer Services

Objective	Aim	Status	Update February 2023
Review policies and processes	Align policies and processes to enable efficiencies, consider best practice and process improvements	In progress	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. Reviews into Discretionary Housing Payments Policy and the Customer Care Policy have now been approved by Members and are currently being implemented and rolled out to staff. The remaining policies are set out below and are being progressed as Priority 1 and Priority 2: - 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	In progress	To be delivered in line with the implementation of the Customer Care Policy.

	specialists in key front facing areas in line with the principle established in the management stage of the review.		
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 the implementation of the 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	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:

	reviews.		

Item	**Description**
Customer Services Transformation	Work led by the Customer Services Transformation Lead to drive forward improvements and development of services. This currently includes: - The Garden Waste Review which has resulted in improvements to processes and a proactive Direct Debit campaign to help manage capacity for the garden waste renewal for 2023. - 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. The new software for Capita has been implemented in October 2022 and processes are now being developed to align and streamline across the organisations. - A calendar of key events for the service has been developed to ensure that capacity can be used effectively to meet different service needs throughout the year.
Technology changes	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. This includes: - 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 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.) - Telephony (a review into shared telephony has now been completed)
Training Academy	Staff training to support and embed service transformation to include: **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 in line with the new Customer Access Policy. A plan for this is currently being scoped with the Learning and Development team, with a formal roll out for staff over the next few months. **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.

Team development/ team building: to be delivered through the annual development days introduced as part of the People Strategy

ICT			
Objective	**Aim**	**Status**	**Update February 2023**
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 room services and the procurement of paper and office stationery within the ICT service	To ensure a consistent approach, minimising impact on business continuity and digital service functions	Complete	This is now complete. 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 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.

Review paper-based information across the authority and identify digitisation requirements for the authorities.	To ensure a consistent approach, minimising impact on business continuity and compiling will all relevant policies and procedures.	In Progress	Work is ongoing with the digitisation of paper-based information across the authority. Progress has been slower than anticipated due to illness within the service but a plan is being developed to move this work forward at a faster rate.
Review the office services role within the structure	To consider the office services and administration functions that are currently carried out in the ICT team for South Ribble	Complete	The office services role has now moved to the Corporate Support service as part of a review of their administrative processes.
Review skills and development	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. There are several apprenticeship, graduate and development posts within the structure which will need consideration for development needs alongside other posts.	In Progress	1:1 development reviews with all staff continue to inform training and development needs for the service moving forwards and training has now been identified for staff on the new technology and business systems. As there are many new members of the team, whole team training will take place as part of the upcoming 'Development Days' being 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	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:

	systems, processes and policy as far as possible		

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.	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)	The roll out of all end-point devices and new mobile kit for staff is due to be completed by the end of February. This includes new phones, tablets and laptops to ensure staff can work effectively in a hybrid model.
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	A rolling programme has now been identified to map out when systems will be reviewed in line with urgency and readiness of service. This is now progressing well with Programme Management Support from the Transformation and Partnerships service.
Shared help desk and telephony	To support the alignment of systems across shared services.	TBC	The shared helpdesk and telephony system has progressed well and is scheduled to go live in February.

Indicator	Polarity	Target	Chorley				South Ribble			
			Q3 2021/22	Q3 2022/23	Symbol	Trend	Q3 2021/22	Q3 2022/23	Symbol	Trend
Communications and Visitor Economy										
% of email open rates within the Attain System	Bigger is better	50%	57.17%	**58.8%**	★	**Better than Q3 2021/22**	54.56%	**69.37%**	★	**Better than Q3 2021/22**
Social media engagements	Bigger is better	52807- Chorley Baseline SRBC	52807	**86361**	★	**Better than Q3 2021/22**	74290	**14503**		**Worse than Q3 2021/22**
Number of visitors to Astley Hall (Ticket Sales)	Bigger is better	Baseline	*New for 2022/23*	**6304**	★	*Comparison not available*				
Governance Services										
% valid postal/proxy vote applications processed within 3 working days	Bigger is better	95%	100%	**100%**	★	**Same as Q3 2021/22**	*New for 2021/22*	**100%**	★	*Comparison not available*
% legal files opened within 5 days	Bigger is better	90%	90.80%	**89%**	●	**Worse than Q3 2021/22**	100%	**100%**	★	**Same as Q3 2021/22**
% prosecution / civil litigation files reviewed within one month of receipt	Bigger is better	90%	0%	**100%**	★	**Better than Q3 2021/22**	100%	**100%**	★	**Same as Q3 2021/22**
Transformation and Partnerships										
% Performance information provided by quarterly deadline	Bigger is better	85%	78%	**84.9%**	●	**Better than Q3 2021/22**	36%	**83%**	●	**Better than Q3 2021/22**
% Corporate Strategy projects on track / delivered – council-wide	Bigger is better	90%	-	**86%**	●	**Comparison not available**	-	**93%**	★	**Comparison not available**

Indicator	Polarity	Target	November 2021/22	November 2022/23	Symbol	Trend	December 2021/22	December 2022/23	Symbol	Trend
Total visits to the Chorley Council Website	Bigger is better	300,000	1,219,745	**930,940**	★	**Worse than Q3 2021/22**				
% of service website pages overdue	Smaller is better	15%	11.70%	**10.90%**	★	**Better than Q3 2021/22**				
% Satisfaction with OD activities	Bigger is better	95%	98%	**96%**	★	**Worse than Q3 2021/22**	94%	**98.50%**	★	**Better than Q1 2021/22**
% minutes of the Chorley and South Ribble Partnership published in 10 working days	Bigger is better	95%	100%	**100%**	★	**Same as Q3 2021/22**	100%	**100%**	★	**Same as Q3 2021/22**
% of shared services development actions on track	Bigger is better	70%	75%	**81.30%**	★	**Better than Q3 2021/22**	75%	**81.30%**	★	**Better than Q3 2021/22**

Customer Services

Indicator	Polarity	Target	November 2021/22	November 2022/23	Symbol	Trend	December 2021/22	December 2022/23	Symbol	Trend
Chorley										
Percentage of Council Tax collected	Bigger is better	2021/22 Outturn	**73.14%**	**73.33%**	★	**Better than Q3 2021/22**	**81.94%**	**82.11%**	★	**Better than Q3 2021/22**
Percentage of Business Rates (NNDR) collected	Bigger is better	2021/22 Outturn	**68.27%**	**69.51%**	★	**Better than Q3 2021/22**	**77.95%**	**79.90%**	★	**Better than Q3 2021/22**
South Ribble										
Percentage of Council Tax collected	Bigger is better	2021/22 Outturn	**75.15%**	**75.93%**	★	**Better than Q3 2021/22**	**84.40%**	**85.09%**	★	**Better than Q3 2021/22**
Percentage of Business Rates (NNDR) collected	Bigger is better	2021/22 Outturn	**68.04%**	**73.71%**	★	**Better than Q3 2021/22**	**76.79%**	**81.20%**	★	**Better than Q3 2021/22**

Chorley	South Ribble

Indicator	September 2022/23	October 2022/23	November 2022/23	December 2022/23	January 2022/23	September 2022/23	October 2022/23	November 2022/23	December 2022/23	January 2022/23
% calls abandoned	21.89%	21.65%%	21.55%	25.23%	28.02%	24.34%	24.79%	19.67%	15.86%	22.95%
% calls answered within 90 seconds	30.28%	38.71%	39.26%	30.97%	43.45%	25.29%	25.08%	37.24%	48.58%	49%
Average wait time before calls answered	00:04:58	00:05:04	00:04:55	00:04:38	03:49	00:06:52	00:07:21	00:05:12	00:03:44	04:34

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 and this continues to be managed proactively such as through third party agency support where required and the continued training of new staff. The abandoned call rate has increased slightly over the last month for both councils, but the % calls answered within 90 seconds has continued to improve.

Based on feedback from the last Shared Services Joint Committee monitoring report, future local indicators for customer services have been reviewed as part of the Customer Access Charter which was approved by both Cabinets in January 2023. The renewed indicators will focus on customer satisfaction and average wait times in place of abandoned call rates (which do not differentiate for the different reasons that a call may be abandoned.) The targets will be staggered to reflect continuous improvement for the service as outlined below:

	Indicator	New Target 23/24	24/25	25/26
Chorley	% of customers satisfied with the service they received	60%	70%	80%

	Average wait time < 5 minutes	40%	55%	70%
South Ribble	% of customers satisfied with the service they received	60%	70%	80%
	Average wait time <5 minutes	40%	55%	70%

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