

Shared Services Joint Committee

Monday, 24th July 2023, 6.00 pm

Shield Room, Civic Centre, West Paddock, Leyland PR25 1DH

Agenda

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| <p>1 Apologies for Absence</p> | |
| <p>2 Minutes of meeting Tuesday, 21 February 2023 of Shared Services Joint Committee</p> | <p>(Pages 3 - 6)</p> |
| <p>3 Declarations of Any Interests</p> <p>Members are reminded of their responsibility to declare any pecuniary interest in respect of matters contained in this agenda.</p> <p>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.</p> | |
| <p>4 Shared Services Monitoring Report</p> <p>To receive and consider the report of the Director of Change and Delivery.</p> | <p>(Pages 7 - 36)</p> |
| <p>5 Shared Services Future Options</p> <p>To receive and consider the report of the Director of Change and Delivery.</p> | <p>(Pages 37 - 42)</p> |
| <p>6 Any urgent business previously agreed with the Chair</p> | |

Chris Sinnott
Chief Executive

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WORKING TOGETHER

Minutes of Shared Services Joint Committee

Meeting date Tuesday, 21 February 2023

Members present: Councillor Alistair Bradley (Chair), Councillor Paul Foster (Vice-Chair) and Councillors Aniela Bylinski Gelder, Alan Cullens, Margaret France, Kim Snape, Margaret Smith, Karen Walton and Peter Wilson

Members present Virtually (non-voting): Councillor David Shaw

Officers: Chris Sinnott (Chief Executive), Vicky Willett (Director (Change and Delivery)) and Nina Neisser (Democratic and Member Services Officer)

Other Members: Councillors Terry Howarth, Phil Smith and Julia Berry

17 Apologies for Absence

There were no apologies for absence received.

18 Minutes of meeting Wednesday, 30 November 2022 of Shared Services Joint Committee

Resolved (For: 6 Abstain: 4)

For: Councillors Bradley, Foster, Cullens, France, Walton and Wilson

Abstain: Councillors Bylinski-Gelder, Shaw, Smith and Snape

That the minutes of the meeting of the Shared Services Joint Committee held on Wednesday, 30 November 2022 be approved as a correct record for signature by the Chair.

19 Declarations of Any Interests

None received.

20 Shared Services Future Options

Vicky Willett, Director of Change and Delivery presented the report which set out potential options for the future development of shared services.

The shared services programme has led to a shared workforce of around 50% for the two councils so far and generated savings on excess of £1.6m across the two councils. Following the implementation of phase 3 of shared services in February 2023, options for the future of sharing between the councils were considered by the

Committee. Several key options for further shared services were outlined within report, considering the potential benefits and issues for each option.

Following discussion, Members proposed to pause further shared services until after summer whilst taking the opportunity to look into the options for sharing a smaller service, such as Environmental Health and exploring any external opportunities. It was anticipated that an update would be provided to the Committee at the meeting in June before bringing proposals for progression forward in September.

The Committee reaffirmed their commitment to progressing Shared Services but noted the positives of the above approach which included;

- Providing an opportunity to pause and reflect whilst the elections take place in May
- Addressing and resolving any issues faced so far
- Making progress in transferring all staff on to the shared terms and conditions
- Welcoming the new Heads of Service
- Filling any current vacancies

It was agreed that the next meeting in March be cancelled to allow officers to undertake work as proposed, and should anything emerge in the meantime, Members would be updated.

Resolved (unanimously):

- 1. To pause further delivery of new shared services until after summer whilst looking into the options of sharing smaller services.**
- 2. External opportunities - to consider other alternatives to sharing outside of Chorley and South Ribble councils, including different partnership arrangements with other councils and organisations.**

21 Shared Services Monitoring Report

Vicky Willett, Director of Change and Delivery presented the report which provided 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.

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. The phase 2 shared services were implemented in November 2021 for ICT and March 2022 for Customer Services. Future reporting would also include the recently implemented phase 3 Property and Assets service which was implemented on the 1 February this year.

Overall, there has been in excess of £1.6m savings realised since commencing shared services with over £900k at CBC and over £700k at SRBC. Most services operate on a 50/50 basis with exceptions reflecting the specific needs of either authority.

Staff satisfaction within shared services has been measured through the Pulse Survey which is carried out every 6 months. 93 members of staff completed the survey at the beginning of 2023 which represents just under half of all shared services staff.

The Committee noted that the results show that whilst satisfaction has dropped slightly since the last survey in September 2022, it still remains higher than in June last year and an increase in relation to those services not part of shared services. Members raised slight concern at the drop in satisfaction but recognised this could be due to a drop in the number of people completing the survey. This would be monitored closely going forward and it was suggested that officers look at how we can engage with staff further.

It was noted that the results also highlighted that the Customer Service and IT Services required improvement and Members recognised that recruitment remained a challenge. The vacancies in IT were predominantly around the business development area of the service. This was a competitive area in the private sector and therefore officers would reconsider the recruitment process. Following queries, Members were advised that performance data for the IT Service would be provided in the next reporting period.

Resolved (unanimously): To consider the shared services monitoring report and note the current progress for phase 1 and 2 services.

Chair

Date

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Chorley
Council

WORKING TOGETHER

Report of	Meeting	Date
Director Change and Delivery	Shared Services Joint Committee	24 July 2023

Shared Services Monitoring Report- July 2023

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 services that are shared between Chorley Council and South Ribble Borough Council. The report considers 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.

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, 2 and 3 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 subsequently been reviewed including Events, and Museums, Tourism and Culture under the Communications and Visitor Economy service as well as Health and Safety and Corporate Support under the Governance service.
7. The phase 2 shared services were implemented in November 2021 for ICT and March 2022 for Customer Services.
8. The phase 3 shared service, Property and Development, was implemented on the 1 February 2023 and is being reported on for the first time as part of this monitoring report.
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.

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
 - IT Digitisation Team which is split 20% CBC and 80% 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 CBC Town Hall and Civic Services staff.
12. Unlike the rest of Shared Services, within Customer Services, ICT and Property and Assets there is no specific host Council. The posts are employed and shared across both Councils and recharged on a 50:50 basis or according to the relevant exceptions.

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. 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. The survey received 183 responses from shared service employees, and 100 open feedback responses. This represented 72.1% of Shared Service staff. Results are outlined below, compared to last year in June 2022.

Phase One

	% +/-	Pulse Survey May 23 (Phase One)	Pulse Survey June 22 (Phase One)
Service	↑ 0.2	95.4%	95.2%
Role	↑ 2.1	98.9%	96.8%
Skills and Knowledge	↑ 1.1	97.7%	96.8%
Happiness	↓ 4.3	74.7%	79%

17. Phase one employees:

- Continue to have a strong understanding of their service, role and skills required. This has been maintained with over 95% average agreement with these three questions.
- Happiness has reduced slightly, and this was primarily due to employees indicating ‘neither’ rather than disagree.

Phase Two:

	% +/-	Pulse Survey May 23 (Phase Two)	Pulse Survey June 22 (Phase Two)
Service	↑ 27.9	94.6%	66.7%
Role	↑ 29.3	93.2%	63.9%
Skills and Knowledge	↑ 15.5	90.5%	75.0%
Happiness	↑ 34.4	62.2%	27.8%

18. Phase two employees:

- Showed significant improvements in understanding regarding their role and service. Responses indicated that more employees now feel that they have the skills and knowledge needed for their job.
- Customer services showed significant increase in staff happiness.

Phase Three – Property and Development

19. The Property and Development service shows high levels of understanding of the role of their service in contributing to both councils alongside the skills and knowledge required for their roles. There was slightly lower agreement with understanding of individual roles at the time of the survey, and work has taken place since then to embed the new job roles and carry out the transition of workloads and duties.

20. Overall satisfaction is higher within this service (implemented as a shared team on the 1 February) than in the phase 2 services when they had recently been implemented. This indicates that staff are now happier following the change process than previous phases, indicating that our change process and support for staff has improved.

Property and Development	
Service	100%
Role	89.5%
Skills	94.7%
Happiness	68.4%

Open Feedback

21. The following open feedback identifies key themes and areas for improvement alongside planned interventions to address key issues. These findings are broadly in line with the wider organisations.

Key feedback	Interventions
<p>Ways of Working</p> <ul style="list-style-type: none"> • Staff feel supported within their teams and feel that they work well with their colleagues. • Teams indicated they work well with immediate colleagues but highlighted opportunities to improve collaboration and coordination between services. 	<ul style="list-style-type: none"> • Reinforcing a positive culture through an organisation wide ‘employee experience’ (It’s All About Us event) to establish future values and behaviours. • The introduction of new employee recognition initiatives • Team Talk Initiative to support cross team learning and collaboration • Tailored People Strategy initiatives through engagement and well-being activities.
<p>Capacity:</p> <ul style="list-style-type: none"> • Knowledge gaps and need for effective succession planning in some areas • Recognition from staff that work has taken place to recruit to vacant posts and that this has helped to improve capacity given concerns around high workloads 	<ul style="list-style-type: none"> • Review of recruitment and onboarding projects to improve the recruitment process • Targeted recruitment in difficult to recruit to areas • New apprenticeship and graduate offer to build our talent pool and to support with succession planning
<p>Communication</p> <ul style="list-style-type: none"> • Embedding system and process changes following the initial change process, including rationale and benefits. • Ensuring that messages are cascading consistently through the organisation 	<ul style="list-style-type: none"> • Internal Communication Strategy initiatives • The roll out of the new staff intranets for improved employee experience • Digital Feedback Box promoting two-way communication between the Senior Management Team and staff • The new monthly staff email to ensure everyone gets key messages at the same time

22. Whilst it is difficult to compare to surveys by other organisations 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.

23. 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

24. 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.

25. Phase 1 objectives have been refreshed and updated. 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. New objectives have also been identified for phase 3, Property and Development.
26. The full-service development objectives and status update for 2022/23 are available in appendix A. Below is a summary of the work completed over the last quarter towards developing the shared services, alongside case studies to highlight key achievements over the last year.

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

- A new objective has been identified to undertake an internal review of Performance and Partnerships resource to reflect progress and add further value now that the service has been shared for three years. The proposals aim to build on the development of shared performance and programme management systems and frameworks, which have now been embedded across the councils. The service will also deliver a business partnering approach to advising services across the organisation. Following engagement and consultation with the team, proposals have now been signed off and implemented.
- Work has continued on the delivery of phase 2 of the HR transformation project including the roll out of HFX time management system which has now been rolled out to all staff. A new recruitment system is also currently out for tender and is due to be finalized by the end of the year. The new systems aim to be more efficient, enabling managers to self-serve where possible and automating processes for a better experience.
- 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 developed for South Ribble to ensure a strategic approach for developing the visitor economy and tourism offer within the borough. The strategy will now progress for members to review at Cabinet.
- The internal communications strategy is being progressed including the launch of the new intranet for Chorley council and work to develop the new intranet for South Ribble. This will help to improve the sharing of information and communications across the organisations, ensuring staff feel informed and aware of key changes and updates.

CASE STUDY: Shared Events Function

The shared events team has introduced dedicated capacity for events management at South Ribble, enabling the council to develop a wider events programme of larger scale events. The team have put in place a refreshed approach to events management, with the introduction of more detailed processes and events management plans. This has allowed the team to successfully deliver a full programme of events over 2022/23 including Leyland Festival, Music in the Park, A Taste of Leyland and the Christmas Lights Switch On. The events have provided new opportunities for communities to come together and celebrate. Looking forward, the team is now reviewing new events which could be delivered in the future to further expand on the events programme, whilst also making improvements based on feedback from previous events.

CASE STUDY: Shared HR Hub

The shared HR team have implemented a shared payroll, HR Hub and time management system. The roll out of HFX (the time management system) has been expanded from South Ribble Borough Council, across to Chorley Council and the Leisure Companies. This replaced an old system being used by Chorley and has expanded the functionality of the system across both councils to deliver an integrated approach to time management and payroll. The new system allows managers from either council to manage staff time management through one system, with integrated functions for different processes, such as reporting sickness. The system also allows for improved information and reporting to be available to managers and the wider organisation, with next steps to include the implementation of a manager dashboard to provide quick access to key information.

PHASE 2- Customer Services and ICT

- The development of new policies for the Customer Services and Revenues and Benefits service has continued with the Council Tax Discretionary Hardship policies approved by both Councils in May. The refreshed policies are more accessible for customers, making it easier for residents who are most in need to access support.
- A new training officer has been recruited to the Customer Services team to support the training and development of the team, including for new and apprentice staff. Training is also being developed in line with the new Customer Access Charter to ensure and consistent approach to customer care standards across the organisation.
- Process improvements have continued for the customer services team, including work taking place to improve and automate processes on the revenues and benefits system. A shared telephony system has also been rolled out which provides greater resilience through a cloud based system and fully integrates within existing Teams software. This will deliver further benefits through stage two of the roll out which will introduce functionality to measure customer satisfaction, automated real time reporting and additional digital channels such as web chat.
- 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 and enable agile and hybrid working. Devices including phones, tablets and laptops have now been rolled out to all staff, with next steps to be the return of any legacy hardware.

- Business systems used to manage day to day work across the council have now been identified and a review will be started to improve and upgrade systems as part of a rolling programme. The aim of the review is to ensure that systems meet the needs of service areas and that the councils are making best use out of system functionality.

CASE STUDY: Shared ICT Service

Despite facing the challenge of vacant posts within the team and difficulties in recruitment, the shared ICT service has delivered a large programme of work over the last year to ensure that the systems and technology that the councils use are sustainable, fit for purpose, and meet the needs of the organisations.

The shared service has allowed for some work to 'be delivered once' across both councils, reducing the duplication of work in the project management and delivery of ICT improvements.

Over the last year, the service has delivered the roll out of new mobile key, the single desktop across both authorities, the roll out of new laptops, multi-functional printers, door access system, hosting of the time management system and the new intranet. This is alongside work to continue digitising files and documentations, reviewing current business systems, and review of internal and external forms to deliver automated processes and improved customer self-service.

The main benefits of this programme of work have been ensuring that the infrastructure and technology that we have in place is fit for purpose, with improved functionality and integration with existing systems. The changes also better enable flexible and hybrid working from any location.

CASE STUDY: Improved policies and processes

Customer services and revenues and benefits policies have been reviewed to ensure that these are aligned wherever possible and that staff can work effectively to one set of policies and procedures. The service has also taken this opportunity to take the best practice from each of the council's current policies, whilst also incorporating other industry best practice.

The refreshed policies are all clear, easy to understand and have been simplified where possible. This makes them more accessible to residents and other customers, whilst also making sure that key timescales and procedures are clearly defined.

The councils have also been making improvements to processes, such as introducing new automation to revenues and benefits processes through the council's Capita software and reviewing the Garden Waste process to help better manage demand and customer calls during the renewal period.

These changes have seen improvements to managing customer contact and demands over the last year, but further improvements are now being planned to support the continuous improvement of the service and to make processes quicker and easier for all customers.

PHASE 3- Property and Development

- The new shared service was implemented on the 1 February with the start of new Head of Service starting in post on the 1 April.
- Work has taken place to bring the shared service together through an induction and development programme including a team building session facilitated by an external provider and a listening session to identify barriers and opportunities for the shared team.
- Recruitment has taken place to vacant posts within the service including the Senior Surveyor roles which will help to improve capacity within the service and drive forward progress.
- Work has started through the Commercial Services Development Group to update and align policies and processes across the organisations including utility management procedures, planned preventative maintenance and a procurement policy.
- Work has started to define the specification and project plan for a new property management system. This is expected to be delivered over the next 18 months and will provide a single version of the truth for all property records, automating processes and ensuring works, inspections and reviews are carried out according to planned timeframes.

Performance

27. 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.
28. The latest available performance information for outcome based performance indicators is set out at appendix B. The performance indicators for ICT are currently being designed and captured to reflect new systems. Once the new systems are in place, the indicators will be brought online and included in future reporting.
29. For Q4 2022/23 performance has been high across the services with only 4 of the indicators currently off target, an all being within a 5% threshold of the target. The majority of indicators are also performing the same as or better than Q4 2021/22.

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. 3 risks are identified as **medium-risk** in relation to impact and likelihood, and 3 risks are identified as **low-risk**. Risks remain relatively stable across shared services, with the narrative in the table below explaining where risks have changed, for example, due

to the successful delivery of mitigating actions or greater stability following the recent elections.

32. All risks will continue to be monitored as part of the shared services project and corporate strategic 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	Target Action Date	Comment
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	2	6	<p>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.</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> <p>Review of management capacity to provide additional senior management resource at Head of Service Level to support shared Director team.</p>	<p>Ongoing – August 2023 Completed</p> <p>Completed</p> <p>Completed</p> <p>Completed</p>	Since the last monitoring report, this has been reduced from 9 to 6 to reflect completed actions including additional senior management capacity to help support change and transition to shared services, alongside operational risk assessments for new shared services.
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>The People Strategy has introduced a range of initiatives to support staff wellbeing and morale.</p>	3	3	9	<p>Training and development plan being delivered for Customer Services in line with the implementation of the shared service model.</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</p>	<p>Ongoing- September 2023</p> <p>Ongoing</p>	Incorporating lessons learned into the future delivery of shared services has made a positive impact on the implementation of existing shared services as evidenced through the pulse survey. However, the overall risk remains at a 9 due to future services that will be considered.

						<p>which are going through a shared services review.</p> <p>Internal communications strategy initiatives to ensure clear communication across the organisations</p> <p>Employee recognition initiatives</p>	<p>September 2023</p> <p>December 2023</p>	<p>It is expected that this risk will begin to reduce as shared services continued to become further embedded across the councils, alongside the refreshed approach to internal communications and employee engagement.</p>
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			No changes, both councils continue to engage in any potential changes to wider local government structures
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	1	3	<p>Options on future of shared services to be considered at Shared Services Joint Committee in February 2023.</p> <p>Updates on options for future shared services to be provided to the Shared Services Joint Committee in June alongside full report in September</p>	<p>Complete</p> <p>September 2023</p>	Risk level decreased from 6 to 3 to reflect decreased likelihood of lack of cross party support following the recent council elections.

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		No changes, this remains low risk
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		No changes, this remains low risk

Climate change and air quality

33. The work noted in this report has an overall neutral impact on the Councils Carbon emissions and the wider Climate Emergency and sustainability targets of the Council.

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 financial implications of this report. Shared Services costs and savings now form a significant and growing part of both Councils MTFS. This is monitored in year and relevant costs are attributed to each Council.

Comments of the Monitoring Officer

37. No comments.

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		12.07.2023

Objective	Aim	Status	Update June 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	<p>The programme to move to the new terms and conditions has now started, with the Economic Development service on the new terms and conditions, and reviews currently taking place for Neighbourhoods and Waste (South Ribble) and Planning and Enforcement, to move the services onto the new terms and conditions.</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, helping to support recruitment and retention.</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.	Complete	Closed

<p>Review of Performance and Partnerships Resource</p>	<p>To review and implement a new structure for the Performance and Partnerships team to enable a business partnering approach</p>	<p>In progress</p>	<p>A new objective has been identified for the review of Performance and Partnerships resource. Proposals have been developed for the service structure and are currently out for formal consultation to then be approved by Executive Members.</p> <p>The proposals aim to build on the development of shared performance and programme management systems and frameworks, which have now been embedded across the councils, and deliver a business partnering approach. This will aim to provide service managers with advice and guidance on projects, business planning and performance through an intelligence led approach.</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>The roll out of the HFX time management system has now been completed across both councils and is now being implemented to the leisure companies. This aligns the system for time management across both councils and enables greater functionality for managers.</p> <p>Additional workstreams have been identified for the HR transformation phase 2 to deliver further self-service, automation of processes and additional functionality. These include the development and embedding of personnel files within the HR Hub and a new manager dashboard to provide easy access to information, alongside embedding and training staff on the new HR processes across the organisation.</p> <p>A recruitment system is currently out for tender and is due to be finalised by the end of the year. The new system will offer an integrated end-to-end solution for recruitment, reducing the amount of manual processing required by HR and recruiting managers, and developing a streamlined process which can offer an improved candidate experience and attract talent to the organisations.</p>

Governance			
Objective	Aim	Status	Update June 2023
Implementation of corporate admin process review	To review the administrative processes in corporate support to enable efficiencies and align processes across the service.	Complete	Closed
Develop support offer for the Leadership Team	To support senior management capacity by developing a standardised support offer for the Leadership Team.	In progress	A suite of options has been developed to set out the expectations for senior management support from the corporate support team. This will be aligned with the new Heads of Service who are now all in post (as of April 2023) and the new director structure which is currently out for formal consultation across the councils.
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	Complete	Closed

	opportunities to reconsider the procurement structure to ensure that it can best meet the priorities of the organisations.		
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 applied where possible across the organisations.	In progress	A review into Health and Safety policies is currently ongoing with a number of key policies now reviewed and aligned where appropriate. These include manual handling, display screen assessment and lone-working policies. Further work is being delivered on policies which are specific to certain teams in line with the relevant service areas.

Communications and Visitor Economy			
Objective	Aim	Status	Update June 2023
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	The South Ribble Tourism Strategy has now been developed and approved by Cabinet. 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.

			The delivery of the strategy will form a key action for 2023/24
Operation of two historical buildings across the borough	To deliver the operation of Worden Hall and Astley Hall. This will include the first full year of delivery for Worden Hall and looking at more opportunities to generate income across the Astley Hall site	In progress	This action is new for 2023/24 and will monitor the shared museums, tourism and culture team in their delivery of the operation of historical buildings across the borough.
Deliver shared events programme	To deliver the events programme as a shared team.	Complete	The events programme for 2022/23 has now been successfully completed.
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	<p>The internal communications strategy and timeline for activity has now been approved and work has started on delivering the new strategy until Autumn 2023.</p> <p>The new intranet has been launched for Chorley as the existing intranet was no longer fit for purpose. The new site will now be expanded to South Ribble. This enables greater self-serve for staff to share their own communications and will also make it quicker and easier for the communications team to upload new items. The new system allows for better monitoring of engagement and interaction with posts and can be accessed by staff through their work mobile devices.</p>

			<p>Yammer, which acts as a form of workplace social media to share information and celebrate success across the organisation, is also due to be relaunched and widened across the councils. This will ensure that everybody knows how to make best use of the internal communications tools.</p> <p>Other key actions to progress through the strategy will help to improve internal communications and include:</p> <ul style="list-style-type: none"> - Looking at how we use buildings to share messages i.e. noticeboards - Introducing a regular email for all staff to ensure key messages are shared at the same time
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ICT			
Objective	Aim	Status	Update June 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	<p>This has been completed with all relevant line of business applications now managed within the ICT service to ensure integration between systems.</p> <p>This will now be replaced with an action to review current line of business systems through a rolling programme, working with teams to identify relevant specifications. Good progress continues to be made against this with NEC (document management), IKEN (Legal) and IDOX (regulatory services) all due to go live in September 2023.</p> <p>Work is currently underway to standardise processes and ways of working across Councils to ensure the best use of technology and more efficient working practices.</p>
Consolidate post room services and the procurement of	To ensure a consistent approach, minimising impact on business	Complete	Closed- This is now complete with office services now sitting within the corporate support team for paper and office stationery.

paper and office stationery within the ICT service	continuity and digital service functions		Customer Services are currently implementing a Hybrid Mail for post room services. This will allow for mail to be automatically sent out to residents from each council without manual printing and postage.
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 by identifying resource to support this work.
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	Closed- the office services roll now sits within Corporate Support as part of their administrative processes.
Review skills and development	<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>	Complete	<p>Closed- All staff have taken part in skills and development conversations through the performance review process. All staff have undertaken training based on personal requirements with further training also scheduled.</p> <p>ICT are currently interviewing for vacant posts and training needs for successful candidates will be identified following interview.</p>

Finalising the kit roll out of all end-point devices	Following on from the roll out of end point devices, old legacy kit now needs to be returned to ICT in order to remove all legacy hardware and ensure consistency across the organisations.	Not started	New action- this will be delivered over the next few months
Continue to improve cyber security and awareness across the Councils		Not started	New action- to be progressed over Q2-3.
Refreshed digital strategy	To refresh the digital strategy following it's completion at the end of 2023/24. This will be reviewed and completed in the last quarter of the year.	Not started	New action- to be completed in Q4.

Customer Services			
Objective	Aim	Status	Update June 2023
Review policies and processes	Align policies and processes to enable efficiencies, consider best practice and process improvements	In progress	The Council Tax Discretionary Hardship Policy was approved by both councils in May. The only remaining policy now to be reviewed is the Business Rate Discretionary Rate Relief Policy.

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	This is to be rolled out in line with training on the new Customer Access Charter.
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	This will be rolled out in line with the Customer Access Charter. Options for a training package including e-learning training are currently being finalised.
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	Complete	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 and will form new actions for 2023/24.

	individual development reviews.		
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Item	Description
Garden Waste Review	The Garden Waste Review has resulted in improvements to processes and a proactive Direct Debit campaign to help manage capacity for the garden waste renewal for 2023. Workshops with staff have started to look at further improvements to be made for the process for 2024, analysing issues and challenges.
Review of Revenues and Benefits Processes	A 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 was implemented in October 2022 and processes are now being developed to align and streamline across the organisations. Staff from the service area are being involved in workshops to map out the current processes to review improvements to be made.
Review of hybrid mail and virtual mail room	Review of hybrid mail and virtual mail room for scanning and indexing incoming post. This automates the process of digitising correspondence and records, alongside the printing and posting of outgoing mail. The virtual mail room is already implemented at Chorley and is now due to go live at South Ribble.
Telephony system	A review into shared telephony has now been completed with the implementation of the new Enghouse cloud-based system. This is now moving into phase 2 of the implementation which will look to introduce new customer contact channels such as webchat and functionality to measure customer satisfaction.

Property and Development			
Objective	Aim	Status	Update June 2023

<p>Identify an interim service workplan to manage workloads within the capacity of the new shared service and ensure any new responsibilities are clearly defined.</p>		<p>Complete</p>	<p>The new Head of Service has worked with managers to identify service priorities and develop a service business plan in line with the councils' business planning process.</p> <p>Key priorities for the service currently include ensuing utility management procedures are fully in place, alongside bringing the Planned Preventative Maintenance Programme up to date and work on the key Corporate Strategy Major Projects. Work is now progressing significantly in these areas.</p>
<p>Shared Services induction and development</p>	<p>Develop a shared services induction plan to support the transition of the team to a new shared service</p>	<p>In progress</p>	<p>A induction and transition plan is in the process of being delivered including team building sessions and a listening day to identify key barriers for the service and what they need to work effectively as a shared team. This has led to further actions for the induction and development plan including 1:1 reviews to allow staff to identify individual training and development needs within their roles, alongside regular whole service sessions to facilitate team building and cross-team working.</p>
<p>Align policies and processes as far as possible, enabling teams to work effectively across the councils</p>	<p>Deliver refreshed policies and processes that reflect best practice and deliver opportunities for efficiencies</p>	<p>In progress</p>	<p>Work is currently taking place on refreshed utility management procedures and aligned health and safety policies are now in place.</p> <p>Next steps will be to identify further policies and processes that could be reviewed and aligned, alongside a longer-term piece of work to develop a strategic asset management plan.</p>
<p>Implement a shared case management system for the councils</p>	<p>Providing a single source of information, managing scheduled works and reviews more effectively and delivering automation of processes to reduce administrative workloads</p>	<p>In progress</p>	<p>A specification for a shared case management system has been prepared alongside a project mandate and plan for implementation over a 18 month period. This will include digitising and uploading all relevant records and data. A decision around the contract provider is expected to be made in July.</p>

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				Chorley				South Ribble			
Service	Indicator	Polarity	Target	Q4 2021/22	Q4 2022/23	Symbol	Trend	Q4 2021/22	Q4 2022/23	Symbol	Trend
Communications and Visitor Economy	Social media engagements	Bigger is better	49,624	64,425	62,034	★	Worse than Q4 2021/22	17,899	42,917	★	Better than Q4 2021/22
Governance	% of planned time used (Internal Audit)	Bigger is better	90%	84%	127%	★	Better than Q4 2021/22	94%	105%	★	Better than Q4 2021/22
Governance	Number of accidents reported to Health and Safety from work related activity	Smaller is better	8	n/a	2	★	<i>New-Comparison not available</i>	7	4	★	Better than Q4 2021/22
Governance	% first draft legal documents drafted within 4 weeks of receipt (s106 agreements)	Bigger is better	90%	88%	88%	●	Same as Q4 2021/22	100%	100%	★	Same as Q4 2021/22
Governance	% prosecution/civil litigation files reviewed within one month of receipt	Bigger is better	90%	100%	100%	★	Same as Q4 2021/22	100%	100%	★	Same as Q4 2021/22
Transformation and Partnerships	% Corporate Strategy projects on track /	Bigger is better	90%	New for 2022/23	95%	★	Better than Q4 2021/22	New for 2022/23	86%	★	Better than Q4 2021/22

	delivered – council-wide										
Transformation and Partnerships	% minutes of the Chorley and South Ribble Partnership published in 10 working days	Bigger is better	95%	100%	100%	★	Same as Q4 2021/22				
Transformation and Partnerships	% of shared services development actions on track	Bigger is better	70%	75%	71.43%	★	Worse than Q4 2021/22	75%	71.43%	★	Worse than Q4 2021/22

Customer Services

Indicator	Polarity	Target	February 2021/22	February 2022/23	Symbol	Trend	March 2021/22	March 2022/23	Symbol	Trend
Chorley										
Percentage of Council Tax collected	Bigger is better	2021/22 Outturn	94.15%	94.17%	★	Better than Feb 2021/22	97.16%	97.19%	★	Better than March 2021/22
Percentage of Business Rates (NNDR) collected	Bigger is better	2021/22 Outturn	92.37%	93.04%	★	Better than Feb 2021/22	96.75%	96.26%	●	Worse than Feb 2021/22
South Ribble										
Percentage of Council Tax collected	Bigger is better	2021/22 Outturn	95.35%	95.56%	★	Better than Feb 2021/22	96.46%	96.78%	★	Better than March 2021/22

Indicator	Polarity	Target	February 2021/22	February 2022/23	Symbol	Trend	March 2021/22	March 2022/23	Symbol	Trend
Percentage of Business Rates (NNDR) collected	Bigger is better	2021/22 Outturn	92.17%	92.10%	●	Worse than March 2021/22	96.14%	94.46%	●	Worse than March 2021/22

Month	Total Calls	Answered	Missed	Abandoned %		Answered <20secs %		Answered <90secs %		Answered <5mins %	Average wait
January	15761	11679	4082	25.90%	3135	26.84%	5003	42.84%	8558	73.28%	04:15
February	17547	12998	4549	25.92%	4396	33.82%	6811	52.40%	10230	78.70%	02:54
March	25601	18214	7387	28.85%	5200	28.55%	8425	46.26%	13815	75.85%	03:17
April	19349	14446	4883	25.24%	4899	33.91%	7594	52.57%	11613	80.39%	02:46
May	18960	13699	5261	27.75%	3696	26.98%	6127	44.73%	10134	73.98%	03:23

Overall performance for Customer Services is showing a positive improvement trend over the last few months with average wait times reducing from over 11 minutes 30 seconds in June 2022 to an average of 3 minutes 5 seconds over February to May 2023.

There were some dips in performance in March, and then again in May. As shown by the total call numbers, there was a significantly higher volume of calls received in March (25,601) than other months, primarily as a result of Council Tax Billing and Garden Waste Renewals. External resources helped to support the team during this period, but due to staff sick leave this did have an impact on performance for the month. In May, the council elections and power outage at South Ribble had an impact on call wait times. This was worsened by the number of

bank holidays within May, which concentrated the number of calls received within less working days. Despite the small dips in performance, the overall improvement across the service demonstrates how Customer Services is now more resilient to managing challenges and increases in customer contact and demand.

To further improve the service, an ongoing programme of work is taking place to deliver automation to the revenues and benefits services through the Capita system, such as the automation of change in address which will have a particular impact due to the high volume of customer requests. Improvements made to the garden waste programme including a direct debit drive have also helped to improve performance since last years' renewal period. Work is continuing on a training and development programme for the service, including for new apprentice staff, with the new operating model meaning that staff can work effectively across both councils.



Chorley
Council

WORKING TOGETHER

Report of	Meeting	Date
Director Change and Delivery	Shared Services Joint Committee	24 July 2023

Shared Services Future Options - Shared Building Control

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

- To discuss the opportunity for a shared building control service

Recommendations to Shared Services Joint Committee

- To approve a review into shared building control as set out in the report.

Reasons for recommendations

- To support exploration of opportunities for a shared service, in line with the principles and approach previously agreed.

Other options considered and rejected

- To not carry out a review into a shared building control service. This has been rejected as it would not allow the councils to explore the option of the shared service.
- Other potential options for sharing have been considered within this paper.

Background

- Both councils have agreed the aligned principles and approach to the future development of any shared services, which will seek to identify and bring forward opportunities for sharing functions that provide greater sustainability and resilience in service delivery and can be developed to a single operating model wherever possible.
- In February 2023, the Shared Services Joint Committee considered potential opportunities for the future sharing of services following the long-standing shared Finance and Audit and Risk service and the programme of shared services delivery that has been carried out from 2019-2023:
 - 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 and 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

8. The committee decided to have a pause on actively sharing new services to enable consolidation, whilst also continuing to identify opportunistic areas for sharing focusing on the following requirements for change:

- 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

9. This paper provides an update on areas identified for sharing in line with the requirements set out above. against options for sharing, alongside considering the opportunity to carry out a review into a shared building control service.

Opportunities for sharing

10. Summarised below are several opportunities for sharing that have been identified:

	Summary of key considerations:
Building control	<ul style="list-style-type: none"> • Two small functions – opportunity to build resilience • Vacancies within service and hard to recruit to posts due to technical and specialist skills • Opportunities to reduce costs to councils for example by reducing service overspend • Similarities across services - work to same regulations and legislation • Identified as an option for sharing by staff through feedback to the management review consultation
Licensing	<ul style="list-style-type: none"> • Two small functions - opportunity to build resilience • Independent licensing committees • Independent licensing policies based on local context
Planning	<ul style="list-style-type: none"> • Opportunity to share skills and expertise/ succession planning • Central Lancashire Local Plan already part of a joint team alongside Preston • Different structure at each council - planning policy sits within Planning and Enforcement at South Ribble and Spatial Planning at Chorley • Separate planning committees • Potential for conflicts of interest
Public protection	<ul style="list-style-type: none"> • Shared Head of Service and pest control team already in place • There are smaller functions that could be considered for sharing

	such as community safety or animal welfare, to help build resilience and reduce duplication.
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11. Based on the opportunities identified above, it is proposed that building control is considered for a full shared services review based on benefits of sharing expertise and longer term resilience given the technical and specialist skills required.
12. Options for sharing Licensing and Planning require further consideration due to regulatory arrangements and local policy frameworks, therefore it is suggested that these are not brought forward at the moment as functions to be shared. It is suggested that opportunities in Public Protection are given further consideration to understand potential opportunities and limitations of sharing the services. If opportunities are confirmed, this item would be brought back to the joint committee.

Shared building control service

13. Chorley's and South Ribble's building control services are part of the Local Authority Building Control network and deliver the duty set out in the Building Act 1984 for local authorities to provide an at-cost building control service to the public. The function ensures that plans are compliant with Building Regulations and carry out inspections of work on site to ensure compliance throughout the construction process. Building Control sits within the Planning and Enforcement service for each council within the Planning and Development directorate.
14. Chorley has faced issues with recruitment and resilience within the building control service, with only one post currently filled within the team and a large reliance on agency staffing. This reflects wider challenges across the sector, with a high number of vacancies, high average age of building control surveyors and a large proportion of surveyors retiring each year.
15. New regulations are set to come into place over the next year as part of the Building Safety Act 2022. This will include competency requirements which will also make it more difficult to recruit new talent into the sector, with extra training to be required for surveyors. Councils will also require experienced staff to be able to manage upcoming changes to the regulations, including additional duties for higher-risk buildings.
16. Building Control is a small function in terms of the number of posts at each council which creates a level of vulnerability. A shared team would provide greater opportunity to share skills and expertise, whilst building resilience through a larger pool of staff.
17. To summarise, sharing building control would enable greater resilience in a hard to recruit area, effective succession planning for the future, less reliance on high cost agency staffing and enable the team to respond to new regulations.
18. As with all building control services both councils operate within the same regulatory frameworks; they also apply similar fees and charging schemes, and both use IDOX case management software.

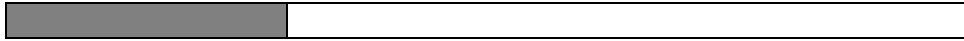
Objectives

19. The objectives for a review into a shared building control service would include:
- Establishing the management and staffing arrangements for a shared service, with staff to move onto the new Terms and Conditions as part of the implementation process
 - Ensure resilience for the service by reviewing capacity and succession planning arrangements
 - Identify opportunities to share systems and processes for increased efficiency
 - To reduce service overspend and costs by ensuring that a sustainable structure is in place

Approach for review

20. It is proposed that a review is carried out into a shared building control service following the councils' Change Policy which would include a pre-consultation stage to engage with teams and feed into proposals for the service. These proposals would then be presented to the Shared Services Joint Committee for approval of a four-week formal consultation period. After the formal consultation period, the final proposals would then be presented to each of the councils for approval and implementation.
21. In line with all shared services reviews, this will involve thorough engagement with staff including multiple opportunities to provide feedback and ask questions, alongside consultation with Unison.

Pre-consultation	<p>Engagement with staff and the union</p> <ul style="list-style-type: none"> • Testing and refinement of options for sharing • Informal consultation sessions • Written feedback
Present to Shared Services Joint Committee	<ul style="list-style-type: none"> • Senior Management Team review proposals and finalise operational risk assessment • Understanding of how shared model will be delivered to be included as part of the proposals • Proposals are presented for review at Shared Services Joint Committee and approval for formal consultation is sought from each council. • Job descriptions are created • Job roles are evaluated through a Job Evaluation Panel
Formal consultation	Formal consultation with staff and the Union including written feedback
Present final proposals to each of the councils	The final review report, including consultation feedback, to be presented for Member sign-off
Implementation	The new service is implemented including recruitment to any vacant posts and full induction and development programme for all new shared roles



Climate change and air quality

- 22. The work noted in this report has an no impact on the Councils Carbon emissions and the wider Climate Emergency and sustainability targets of the Council.

Equality and diversity

- 23. This report has no equality or diversity implications at this stage. A full integrated impact assessment would be carried out on any proposals for the service.

Risk

- 24. Risk will be considered within the impact assessment for the service ahead of any proposals for sharing.

Comments of the Statutory Finance Officer

- 25. There are no financial implications at this point. The review of shared building control services will have its own financial comments and explanations of the outcomes. Shared Services is already embedded within the budgets and monitored monthly.

Comments of the Monitoring Officer

- 26. No comments.

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