

**RECORD OF DECISION TAKEN UNDER SCHEME
OF DELEGATION BY MEMBER OF SENIOR
MANAGEMENT TEAM IN CONSULTATION WITH
PORTFOLIO HOLDER/COMMITTEE CHAIRMAN**



SMT Member:	Gary Hall, Chief Executive
Service Group:	Chief Executive
Portfolio Holder/Chairman:	Councillor Paul Foster
Portfolio/Committee:	Leader of the Council

Subject: Shared Services Phase 1: Service Reviews

- Decision:**
1. To formally approve the restructure and action plan proposals for the Transformation and Partnerships, Communications and Visitor Economy, and Governance service reviews.
 2. To formally approve the proposed arrangements for the consultation and final sign-off for the service reviews.

Details and Reasoning: Please see attached report.

Wider Implications (including Financial, Legal, Equality and Risk): Please see attached report.

**Report attached?
Exempt from publication?
If exempt, give reason(s):**

Yes
Yes
Schedule 12A of part 1 of the Local Government Act 1972: Information relating to any consultations or negotiations, or contemplated consultations or negotiations, in connection with any labour relations matter arising between the authority or a Minister of the Crown and employees of, or office holders under, the authority.

Signed:



Date: 08/09/2020

Financial Management



Date: 08/09/2020

Legal Services



Date: 08/09/2020

SMT Member



Date: 08/09/2020

Portfolio
Holder/
Chairman

Publication Date (DST use):

Decision template revised June 2013

THIS DECISION WILL COME INTO FORCE AND MAY BE IMPLEMENTED FIVE WORKING DAYS AFTER ITS PUBLICATION DATE, SUBJECT TO BEING CALLED IN IN ACCORDANCE WITH THE COUNCIL'S CONSTITUTION

REPORT TO	ON
Head of Paid Service	3 September 2020



TITLE	REPORT OF
Shared Services Phase 1: Service Reviews	Deputy Chief Executive

Is this report confidential?	Yes
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PURPOSE OF THE REPORT

1. To set out the recommendations of the service reviews for phase 1 of shared services.
2. To outline the decision-making process for the service reviews.

RECOMMENDATIONS

3. To formally approve the restructure and action plan proposals for the Transformation and Partnerships, Communications and Visitor Economy, and Governance service reviews.
4. To formally approve the proposed arrangements for the consultation and final sign-off for the service reviews.

CORPORATE OUTCOMES

5. The report relates to the following corporate outcomes:

Excellence, Investment and Financial Sustainability	✓
Health, Wellbeing and Safety	
Place, Homes and Environment	

Projects relating to People in the Corporate Plan:

Our People and Communities	
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BACKGROUND TO THE REPORT

6. Phase 1 of the extension to shared services was agreed by both Chorley and South Ribble Councils in September 2019, to include Communications and Visitor Economy, Transformation and Partnerships, and Legal and Democratic Services.
7. On 1 April 2020, the employment of staff within the new shared services was transferred between the councils, with Communications and Visitor Economy, and Legal and Democratic Services being employed by South Ribble, and Transformation and Partnerships, and Finance being employed by Chorley. The new shared services have started to work together and have benefited from the increased resilience offered by a larger, more diverse workforce, particularly when responding to the Covid-19 pandemic.
8. To maximise the efficiencies and savings that shared services can offer, the new services have undergone a review to develop proposals for, as far as possible, single operating models within the shared functions. Proposals for these service reviews were presented to Shared Services Joint Committee on 2 September 2020 and were supported by the Committee.

SERVICE REVIEW PROPOSALS

9. The proposals for the service reviews, including restructures and action plans, can be found in the report to Shared Services Joint Committee available in Appendix A.
10. The approval of the phase 1 service reviews will allow the new shared services to undertake restructures designed to enable shared functions and single operating models. The implementation of the reviews and the associated action plans will allow the new teams to effectively provide services across both sovereign councils, as well as moving employees onto the new terms and conditions agreed by the councils in July

DECISION MAKING PROCESS

11. The service review recommendations have been presented to the Executive Member (Resources) at Chorley and Head of Paid Service at South Ribble for final sign-off on behalf of the councils.
12. Following approval, the formal consultation period for the service review will commence. The consultation will last for a period of 4 weeks and will provide an opportunity for staff to provide feedback on the recommendations. Staff who are affected as a result of the service review proposals will be provided with support in line with the councils' Change Policy.
13. The consultation period will close on the 2nd October and the final service review proposals, along with any changes following feedback received, will then progress to final sign-off. This will take place at Cabinet at South Ribble on the 14 October and Executive Cabinet at Chorley on the 15 October.
14. A ring-fencing and selection process would take place following the final sign-off, with the implementation of the service review restructures scheduled for the 1 November 2020.
15. Unison will also be engaged with throughout the decision-making process.

CONSULTATION CARRIED OUT AND OUTCOME OF CONSULTATION

16. The service reviews have been developed in consultation with staff. A formal consultation period will follow the sign-off of the service reviews.

COMMENTS OF THE STATUTORY FINANCE OFFICER

17. The forecast financial implications are outlined in the report. These are forecast savings and will change subject to the final structures and job descriptions being agreed. Both councils have set aside reserves to manage implementation costs including potential early retirement or voluntary severance costs.

18. When approved both council's Medium Term Financial Strategies will be updated to reflect the revised costings and savings.

COMMENTS OF THE MONITORING OFFICER

19. The proposed processes for the approval of the staffing changes are appropriate and reflect the decision making processes of each council.

OTHER IMPLICATIONS:

<p>▶ Risk ▶ HR</p>	<p>The approach being taken to the restructure and consultation is in line with the shared Change Policy.</p> <p>The proposals made in the service reviews will support the council in managing its organisational risks by building resilience in key service areas – including, audit and risk and transformation. The service reviews will also support the council in delivering the council's Annual Governance Statement action plan.</p>
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APPENDICES

Appendix A- Phase 1 Service Reviews: SSJC Report

Chris Sinnott
Deputy Chief Executive

Report Author:	Telephone:	Date:
Caroline Winstanley		3 September 2020

Report of	Meeting	Date
Deputy Chief Executive	Shared Services Joint Committee	2 September 2020

SHARED SERVICES PHASE 1- SERVICE REVIEWS

PURPOSE OF REPORT

1. To outline the findings of the service reviews for phase 1 of shared services.
2. To set out the recommendations for each service.

RECOMMENDATION(S)

3. Support the proposed restructures for the Transformation and Partnerships, Communications and Visitor Economy, and Governance services.
4. To note the proposed arrangements for the formal approval of the proposals, consultation and final sign-off for the restructures.
5. To approve the action plans for each of the service reviews.

EXECUTIVE SUMMARY OF REPORT

6. The following report details the process that has been taken for the Phase 1 service reviews and sets out an overview of the consequent recommendations that have been made.
7. The aim of the service reviews was to enable the new shared services to work effectively by bringing together functions in shared teams and developing single operating models wherever possible.
8. Full details of the reviews, including the priorities, approach, findings, and full recommendations can be found within appendix A, B and C.

Confidential report Please bold as appropriate	Yes	No
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BACKGROUND

9. Phase 1 of the extension to shared services was agreed by both Chorley and South Ribble Councils in September 2019, to include Communications and Visitor Economy, Transformation and Partnerships, and Legal and Democratic Services. A shared management team for these services was implemented over the following months, with shared service leads taking up their new roles in January 2020.
10. On 1 April 2020, the employment of staff within the new shared services was transferred between the councils, with Communications and Visitor Economy, and Legal and Democratic Services being employed by South Ribble, and Transformation and Partnerships, and Finance being employed by Chorley. The new shared services have started to work together and have benefited from the increased resilience offered by a larger, more diverse workforce, particularly when responding to the Covid-19 pandemic.
11. To maximise the efficiencies and savings that shared services can offer, the new services have undergone a review to develop proposals for, as far as possible, single operating models within the shared functions. The implementation of the reviews and the associated action plans will allow the new teams to effectively provide services across both sovereign councils as well as moving employees onto the new terms and conditions agreed by the councils in July.

PRINCIPLES

12. The financial case for phase 1 of shared services assumed that within the first two years staffing levels could be reduced by up to six posts, equating to 5% of the new shared workforce. The reduction in posts was proposed to be achieved through aligning processes and systems and by making service delivery more efficient, with further benefits including increased resilience and opportunities for personal development.
13. The service reviews aimed to manage these financial savings through vacancies and voluntary redundancies, with a commitment made by both councils to avoid compulsory redundancy. The creation of the shared management posts achieved an initial saving of £308k, 59% of the projected staffing budget savings for phase 1 of shared services.
14. The following principles outline how the service reviews have been developed in line with these broad aims:
 - Working towards single operating models in all functions. Only exceptions would be where it does not meet organisational needs and priorities.
 - Identify the need for systems and process development and changes before achieving a single operating model across whole functions – this may mean a phased implementation.
 - Aim to secure savings for both organisations, referencing the core principle agreed by SSJC that opportunities will be prioritised on the likely return in terms of savings but also on the needs of both councils.
 - Build in resilience in service delivery and in achieving corporate priorities
 - Provide development opportunities for staff
 - Undertake succession planning
 - Include staff in development of new shared services

PROCESS

15. The service reviews were originally scheduled to take place in Spring 2020 but were postponed due to Covid-19, as service leads considered how to carry out meaningful employee engagement whilst working remotely. The following table outlines the new timescales for the reviews and the process that has been taken to complete the reports, emphasising the role of employee engagement in gathering evidence, reviewing current models, and identifying barriers and opportunities.

Process	Timescale	Staff engagement
<p>Stage 1 – Evidence gathering</p> <p>Establish the ‘as is’</p> <p>Review service business plans, performance, budgets and engage with teams to develop initial conclusions</p>	<p>June/July</p>	<p>Shared services personal development review to establish individual goals and support needs – 1-2-1 meeting by phone/MS Teams</p> <p>Team briefing sessions to outline broad aims and principles of the review with team to feedback – phone/MS Teams</p> <p><i>Questions:</i></p> <ul style="list-style-type: none"> • <i>How do we work together to achieve the vision for the service?</i> • <i>What are the current strengths/areas for development?</i> • <i>What are the opportunities/challenges?</i>
<p>Stage 2 – Review and challenge</p> <p>Develop the ‘to be’</p> <p>Consider where things may need to change to achieve the proposed operating model and any barriers.</p> <p>Also identify any opportunities to deliver further improvements or efficiencies by removing duplication or using technology</p>	<p>July/August</p>	<p>Team briefing to set out proposals and likely structures – phone/MS Teams</p> <p>1-2-1 sessions to seek further feedback and discuss concerns or issues</p>
<p>Stage 3 – Report and recommendations</p> <p>Develop a final report based on the high-level themes (context, performance, staffing, modernisation) and conclude with recommendations and an action plan including dates for implementation.</p>	<p>August/September</p>	<p>Team briefing to communicate outcomes and next steps.</p>

16. It is important to note that the service reviews do not provide the full answer for the changes to the shared services. Immediate changes are recommended alongside action plans which will guide further change and transformation.
17. This report sets out an overview of the reviews, with three appendices setting out the findings, recommendations and actions plans for each service.

DELIVERING SHARED SERVICES

18. Work has already been undertaken to enable the creation of single operating models within the shared services. This includes:
 - Each service has a main work base identified at South Ribble or Chorley, and provision has been for agile working at the Civic Centre and the Town Hall so that employees can work from either location (once this is possible in relation to Covid-19)
 - Technology has been put in place to support working for both councils including providing functionality to send and receive email from either council and to view calendars across shared services.
 - Integrating telephony via Teams to provide the ability to work remotely from colleagues
 - Individual development reviews to support individuals and teams to develop knowledge about the councils and their priorities and working within shared services.
19. Further work is planned, particularly in relation to technology to ensure that it is straightforward for information to be shared between employees working at different sites and on different networks.

RESTRUCTURES

20. Restructures are critical to bringing the shared teams together within a single operating model and the service reviews have focused on the following benefits when creating proposals for the new structures:
 - Streamlining direct line reports to the shared service leads
 - Increasing capacity to deliver certain functions effectively across the two councils, identifying areas to be further developed in relation to the corporate priorities of both councils
 - Reducing duplication across roles to increase efficiency within the shared service, making financial savings where possible and appropriate
 - Creating development opportunities for staff
21. In line with a decision taken by the two councils in establishing the extended shared services, the reduction in posts has focussed on vacant posts to mitigate the risk of compulsory redundancies.
22. The restructures for the new services are proposed to take place through a phased approach which would see Transformation and Partnerships completing their restructure first, creating a single shared HR team who would then be able to support restructures within the other services. Implementation of the new structures will also be enabled by the new shared terms and conditions and pay scales which staff will move on to during the restructure process.

23. Job descriptions will be developed for all posts which will then be job evaluated to identify the relevant pay grade. As such, the staffing budgets detailed within this report are based on indicative grades and will be confirmed following job evaluation.
24. Shared values and behaviours have been established to help develop the job descriptions for each of the new roles and have been developed with consideration for the current behaviours for each council to ensure that they are recognisable to all shared services staff. Shared behaviours can be found in appendix 1, with the main values being:
 - A learning, forward thinking organisation
 - Respect & integrity
 - Pride
 - Two councils, one shared service

Systems and processes

25. The service reviews have also considered how systems and processes can be harmonised to develop a single operating model. This has provided an opportunity to consider how service delivery could be improved by:
 - Modernising the systems and processes within the shared service, delivering increased efficiencies, and improving service delivery.
 - Reducing duplication across the councils to maximise resources and deliver financial savings through reduced FTE and joint procurements.
 - Ensuring that systems and processes are easy to manage, and that staff do not have to switch between systems to deliver services across both councils.
 - Considering the aspirations of the councils, ensuring that sustainable systems and processes are in place to support the future of the shared service.
26. Key systems and processes which are proposed to be reviewed as part of the service review implementation include:

Transformation and Partnerships
<ul style="list-style-type: none"> • Shared performance management framework and shared performance system • A development plan will be prepared for the strategic partnerships • A consistent approach to project and programme management including a shared project management methodology, toolkit, and system. • A shared HR policy framework is already in development • Shared HR system • A consistent approach to change management • An OD Strategy will be developed for South Ribble and the Chorley OD Strategy will be reviewed and refreshed
Communications and Visitor Economy
<ul style="list-style-type: none"> • Web content management system (not specific to shared services,) to move to Goss at both organisations • Social media management platform • A shared email marketing contract

Legal and Democratic

- Shared legal case management system
- Refresh of risk management
- Roll out of transactional/ routine correspondence system

27. The action plans in the appendices set out the anticipated timescales for implementing the changes to processes and systems. Specifications for the actual systems will be considered during the implementation of the service reviews, reflecting on findings from the development of shared frameworks, methodologies, and processes. As such, systems are likely to be implemented in the latter stages of the service transformation.

KEY IMPACTS

28. Some functions, such as events, museum services, and licensing are currently held within shared services for one council, but outside of shared services for the other e.g. licensing is held within the shared Governance function but only supports South Ribble licensing, whilst Chorley Council's licensing section sits within a different directorate, outside of shared services. The service reviews have therefore considered how to bring these functions together and have made recommendations to bring forward separate proposals for a shared team where appropriate. Any further recommendations to change the structure, systems or processes for these functions would consequently be considered when further proposals are presented.

Financial Impact

Phase 1

29. The forecast financial implications of the restructures appended to this report can be summarised below:

	(Savings)/Additional Cost		(Reduced)/Increased FTE	
	CBC	SRBC	CBC	SRBC
Initial Phase – Senior Roles	(57,000)	(251,717)	(0.80)	(2.50)
Communications and Visitor Economy	8,181	(8,181)	0.05	(0.27)
Transformation and Partnerships	(91,369)	6,665	(2.50)	(0.38)
Governance	(30,803)	57,215	(1.52)	1.07
TOTAL	(170,991)	(196,018)	(4.77)	(2.08)

30. The final savings will be dependent upon the final agreed structures and approved job descriptions.
31. The target savings for Chorley and South Ribble councils from the first phase of shared services were £201k and £320k respectively. South Ribble's target was higher to reflect that the council had more senior posts included in the initial phase of restructures completed in January 2020.
32. As outlined in the table above, the forecast savings are below the budgeted levels. The initial savings were estimated in September 2019 and, since then, a number of changes have been made to service structures including additional posts being created and some posts deleted, as well as changes to grades and hours. This ensures the necessary

skills and capacity are in place to enable future transformation and avoid expenditure on consultancy as would have been incurred in previous years.

33. Another reason for the reduction in savings is that the original Council reports understated the on costs for the new senior roles. These savings were adjusted in the February 2020 budget at Chorley Council; however, this adjustment was not reflected in the South Ribble budget. As a result, the South Ribble savings are c. £40k overstated in the 20/21 and 21/22 budgets.
34. Further savings are possible should the Councils agree to extend out the shared service agenda, in the first instance by creating a joint management team structure and subsequent integration of more services.

Grade Structure and Travel Benefits

35. The savings outlined above must be considered alongside the proposed changes to the grade structures and travel benefits also on this committee's agenda.
36. The table below summarises the additional costs and savings from removing the car lease scheme, extending the essential car user allowance scheme and introducing the 6% allowance.

	(Savings)/Additional Cost	
	CBC	SRBC
Amendments to Essential Car User Allowance	35,000	36,000
Costs of Implementing 6% Allowance including Employer NI	177,000	166,000
Savings from removing car lease – salary + insurance costs	(175,000)	(24,000)*
Saving from removing car lease – Employer NI	(39,000)	(5,000)*
TOTAL	(2,000)	173,000

*Car Lease Budget Transferred with shared staff moving from CBC to SRBC payroll

Net Forecast Savings

37. The net effect of these proposals on both council's budgets is an estimated:
 - saving for Chorley Council of £173k
 - saving for South Ribble Council of £23k

NEXT STEPS

38. Following support from the Shared Services Joint Committee, the service review recommendations will be signed off by the Executive Member (Resources) at Chorley and Head of Paid Service at South Ribble. These arrangements are in keeping with the decision-making arrangements for the two councils.
39. The service reviews will then enter a 4-week formal consultation period, which will allow staff to provide feedback on the recommendations. During this time, staff who are affected will be provided with support in line with the councils' Change Policy.

40. After consultation, the final service review proposals with any changes following feedback received, will be presented to Executive Cabinets at both councils in October.

IMPLICATIONS OF REPORT

41. This report has implications in the following areas and the relevant Directors' comments are included:

Finance	✓	Customer Services	
Human Resources	✓	Equality and Diversity	
Legal		Integrated Impact Assessment required?	
No significant implications in this area		Policy and Communications	

COMMENTS OF THE STATUTORY FINANCE OFFICER

42. The forecast financial implications are outlined in the report. These are forecast savings and will change subject to the final structures and job descriptions being agreed. Both councils have set aside reserves to manage implementation costs including potential early retirement or voluntary severance costs.
43. When approved both council's Medium Term Financial Strategies will be updated to reflect the revised costings and savings.

COMMENTS OF THE MONITORING OFFICER

44. The proposed processes for the approval of the staffing changes are appropriate and reflect the decision making processes of each council.

CHRIS SINNOTT

DEPUTY CHIEF EXECUTIVE

Report Author	Ext	Date
Chris Sinnott	5337	24 August 2020

APPENDIX A

Communications and Visitor Economy Service Review

BACKGROUND

The Shared Communications and Visitor Economy service is fundamental to telling the story of each organisation as we move towards a new era for public service delivery in light of our aspiration to share more services. It also plays a key role in directly supporting the local economy through the development of the cultural offer and events across both boroughs.

Looking ahead priorities for the service will be:

- Creating a shared communications team that works seamlessly across both councils with a refreshed strategy and approach
- To understand how the wider team fits in to future plans for each organisation and the appetite for further shared work across the team
- Delivering corporate strategy, transformation and key service improvement projects.

The service currently brings together the communications function with a short-term agreement for a shared museum service. Going forward we will be working towards a wider shared team incorporating the museum and cultural offer, events and tourism, which will be considered in the coming months.

1. Current structure

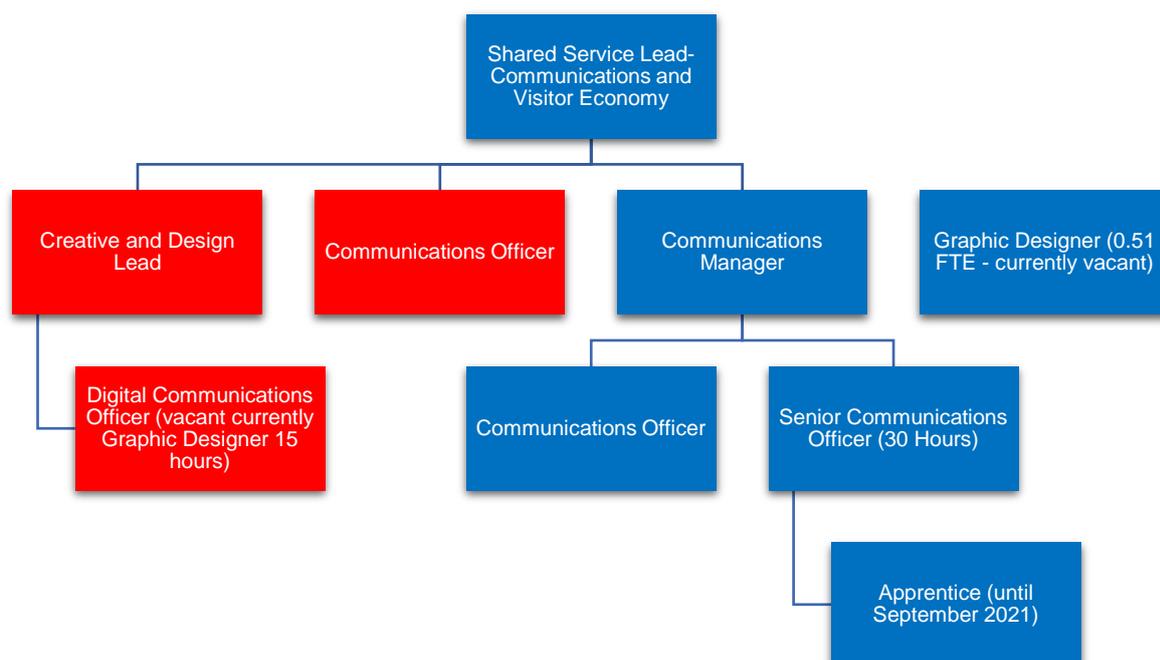
Set out below is the current arrangements for the service, setting out the posts and funding from each council.

Staffing Budget (£000)	Number of staff
554	22

South Ribble funded	Posts	Chorley funded	Posts
Communications	4 (3.32 FTE)	Communications	3
Museum, culture and tourism	1	Museum, culture and tourism	10 (6.64 FTE)
Events	0	Events	3 (2.6 FTE)

The focus of this review is on the Communications part of the service – the following chart demonstrates the current structure of the Communications section:

Communications – As Is



2. Summary of key functions

Communications	Management and delivery of all internal and external communications including media relations, social media management, website and intranet content and reputation management
Branding and graphic design	Oversight of everything that is branded and graphic design of all internal and external material from flyers and posters through to site hoarding and web design.
Events	Management and delivery of all major corporate events in the programme (note this is only currently for Chorley Council).
Museum, culture and tourism	Overseeing the management of key cultural assets, development of the cultural offer and promotion of the borough to attract new visitors (note this is only currently for Chorley Council with the exception of the management of the South Ribble Museum and Exhibition Centre, which has transferred into the team pending a wider review of the service).

3. Systems

Across the service a number of key line of business applications are already in place to support delivery:

Function	Chorley	South Ribble
Social media management	Sprout Social	Managed through site specific tools
Email marketing	Attain	Attain
Web content	Goss (new joint system)	Goss (new joint system)
Graphic design	Adobe suite and Apple Macs	Adobe suite and Apple Macs (introduced for the shared service)

APPROACH

The initial focus for this in this review is on the communications part of the service, which has been brought together from 1 April. The remainder of the team (events and museum, culture and tourism) will be done in the coming months. Options for the consolidation of events delivery at both organisations into a single team will be brought forward by October and the wider museum and culture review will be completed by March 2021. The reason for splitting it is that the service delivery is different at each organisation and needs greater consideration i.e. the functions are already a part of the team at Chorley but at South Ribble sit as part of several different roles in different teams. The whole team will transfer on to the new terms and conditions following the review of the communications part of the team.

FINDINGS

1. Summary

The shared Communications and Visitor Economy service should be telling the story of each organisation to our colleagues and residents in a compelling way that supports the delivery of all the key corporate projects. The vision should be towards a single model that achieves:

- A first class communications service that gets messages out to people in the right place, at the right time in a way that is easy to understand
- A uniform approach to branding that reflects the professional nature of each authority and as a community leader
- An events programme that is the envy of others, delivered through a shared team that supports service delivery in other areas
- A cultural service that lives in the community, not confined to buildings, celebrating our rich history in a way that attracts visitors and in turn supports the local economy

A number of common themes came from the discussions and they will be addressed as part of this review, which will be about a change in how we work as much as any changes to roles and structures. These were:

- A need to improve in three key areas in the communications part of the service:
 - o To work in a more focussed way supporting key projects with more timely planning and evaluation.
 - o To develop our detailed skills in digital communications – while members of the team are proficient, the advances in technology and changing world during the Covid-19 pandemic mean we don't always make the most of these channels.
 - o To improve internal communications – too often the emphasis is on external communications and we need to ensure more focus on keeping staff and members updated. This will help to create a more informed and productive workforce and that everyone understands the role they play in delivering the corporate plan
- A need to better understand how a shared events team could work and be resourced given the delivery of events sits with different people in different teams

- A need to give wider consideration as to what could be included in the museum, culture and tourism part of the team with exciting developments at places such as Worden Hall and Hurst Grange.

With that in mind the basis of this review will be on the communications part of the service with proposals for the events team to come forward in October and options for the museum, culture and tourism part of the team early next year.

The immediate priorities for the service will be:

- Create a new communications strategy for each organisation
- Develop a new approach to internal communications – looking at how this could be delivered within the team but also at how the wider organisation can take responsibility for ensuring everyone is kept informed
- Review the use of digital communications within each organisation to ensure we are maximising the use of each channel, the data and analytics available to us and opportunities for automation to make us more efficient
- Change our approach to working with teams in the organisation so all communications activity is well planned and evaluated to ensure we offer the best value for money as a service
- Bringing forward a proposal for a new shared events team
- Looking at how a museum, culture and tourism service can work across both organisations

2. Challenges and opportunities

Function	Challenges	Opportunities
Communications	They are relatively new teams at each organisation, both have different approaches to work, with each organisation having a different culture and expectations.	Bringing a wider team together is a great opportunity to get to grips with some of the issues both organisations face around planning and evaluating activity, developing digital skills and giving internal communications enough focus.
Branding and graphic design	Chorley Council has had a dedicated resource for some time whereas this has not been the case at South Ribble and teams are either in the habit of doing things themselves or utilising external support.	Improve the standard of external material produced at South Ribble and improve efficiency across both organisations. It will also allow other teams to focus on their core area of work and leave the branding and design to the new team.
Events	The way events are delivered at each organisation is completely different. There is a dedicated team at Chorley whereas it is a part of different people's roles in different teams at South Ribble so it is not easy to identify resource to appropriately staff the new team.	There is a varied events programme at each organisation with lots going on throughout the year. By creating a shared team it will allow other services to focus on their priorities rather than get 'taken over' by event delivery, which can affect their output.

	A shared events team would have a very busy programme of activity in the spring and summer months and we'd need to be able to maintain delivery over a sustained period of time	
Tourism	There is no real dedicated resource to this at either organisation. At South Ribble it is mainly delivered through the business and skills team, which has a business focus and less emphasis is placed on the marketing of the area to attract visitors. At Chorley there is no dedicated resource for this and no budget, which means any concerted activity can be hard to maintain.	By looking to bring together in one team across two organisations it perhaps allows for a more efficient approach that means it can be given the focus it needs rather than attracting visitors centring too much around the events programme.
Museum and culture	Both organisations have differing approaches and levels of staffing to deliver this. The museum service at South Ribble has been a part of the business and skills team whereas at Chorley there is a full museum service. While the South Ribble Museum and Exhibition Centre has been well used the fabric of the building and approach to collections has been neglected and this will need to be improved.	With the exciting developments in this area at both organisations it is the start of a new era for several historic buildings and it gives a great opportunity to really push the cultural heritage at South Ribble and Chorley to residents and the wider region.
Systems and processes	Both teams have different tools and contracts in place for managing social media and email marketing, There is a formal out of hours service for monitoring social media at Chorley – this is more informal at South Ribble and will require some change.	With one team working across each organisation there is scope to make some efficiency savings on contracts. With a wider team the regularity of any out of hours monitoring will be reduced for each individual.
Management	The structures have been bolted together meaning some line management changes need to be considered.	A review of the structure means we can streamline this and create a management team for the service.

CONCLUSION

The service development will start with establishing a new structure that can work easily across each organisation. Resources will be moved slightly but the main emphasis of the communications team review will be about how we change the way we work addressing the three areas highlighted which are around planning and evaluating campaigns, making the best use of digital and increasing the importance of internal communications.

This will help the team have much more influence over the quality and type of communications meaning it improves our reputation, provides better value for money and ultimately delivers improved services for residents who will feel more informed and able to make a contribution to their community.

This change will see a new communications strategy developed that describes everything we will set out to achieve and how we will do that. This should mean we become more efficient as a team and while resource levels will stay the same productivity and results should continue to improve. We will also look at opportunities for automation and self-service that will again mean we can deliver more as a team.

PROPOSED STRUCTURE FOR THE COMMUNICATIONS TEAM

The proposed structure is very similar to how both teams currently operate with a team manager, two senior officers who will lead on the planning and evaluation of the campaigns supported by the communications officer who will support delivery of those plans across different channels, particularly in relation to internal communications. The branding and design element of the team will move in to sit alongside this and a pathway has been created for the team's apprentice meaning there would be a junior role in the team on completion of the apprenticeship with an opportunity for further progression on completion of more training. The emphasis of this will be on the digital skills and by developing our own we will be creating the communications officer of the future.

Management

While some areas of the team are under review this will develop over time but a new service management team will form with the communications manager, creative and design manager, arts and heritage manager and events team leader all being a part of that. A full breakdown of the current and proposed structure including grading is included later in the report.

SYSTEMS AND PROCESSES

Shared systems and processes will be developed as far as possible to support the single operating model and enable the further modernisation of the service. The shared social media, website and email systems will be a priority to review. We'll also be concentrating on having a set format for planning and evaluating communications work as well as an improved process for colleagues to request support, the keys to successful communications and the ability to self-serve where appropriate.

RECOMMENDATIONS

The action plan later in the document sets out a development plan for the service, however the recommendations can be summarised as follows:

1. Undertake an initial reorganisation of the communications part of the Communications and Visitor Economy service to align skills and capacity to achieve a fit for purpose single operating model that can respond flexibly to the needs of either council. This should:
 - a. Streamline reporting lines and create a new management structure for the wider team
 - b. Support a change in how we work with clear roles and responsibilities
 - c. Strengthen capacity in supporting the major projects with two senior officers within the team
 - d. Allow us to give more priority to internal communications
 - e. Create opportunities for improving our digital skills with a clear pathway for the apprentice to get a permanent role within the team
 - f. Allow for an in-house graphic design service to support both organisations
2. To develop a new communications strategy for the team – including a focus on planning, internal and digital channels.
3. Work with colleagues across the organisations to inform them of the changes in how we will work to maximise the benefits a shared team can bring.
4. Look at what opportunities there are for automation and further efficiency.
5. Bring forward proposals to consolidate events management at South Ribble within the shared service. Options to come forward by October.
6. Bring forward proposals for a shared museum, tourism and culture service by the end of March 2021.

FINANCIAL IMPLICATIONS

Current Structure – this is focussed on the communications part of the team for this initial part of the review

Post	Currently funded by	Grade	Budget incl. on costs £
Communications Manager	South Ribble	G08	49,811
Creative and Design Lead	Chorley	POB	46,252
Communications Officer	Chorley	SO1	37,007
Senior Communications Officer (0.81 FTE)	South Ribble	G06	29,287
Communications Officer	South Ribble	G05	32,886
Digital Communications Officer	Chorley	Sc5	30,435
Graphic Designer (0.51 FTE)	South Ribble	G05	15,924
Apprentice	South Ribble	App	0
			241,600

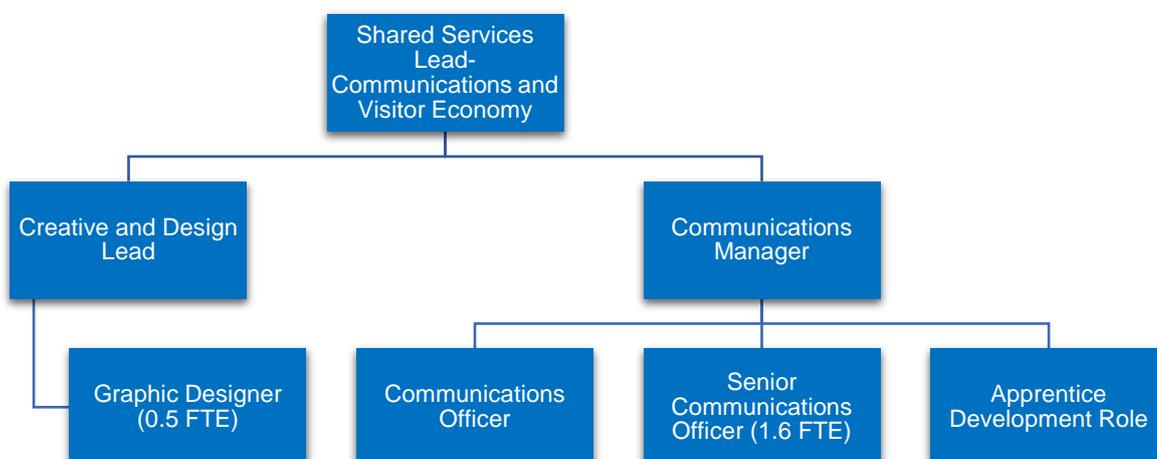
The apprentice is nil cost as it is funded separately to the team budget as part of the South Ribble apprentice factory budget

Proposed Structure

Post	Grade	Budget incl. on costs £
Communications Manager	13	53,369
Creative and Design Lead	11	46,475
Senior Communications Officer	9	39,592
Senior Communications Officer (0.6 FTE)	9	23,755
Communications Officer	7	34,155
Graphic Designer (0.5 FTE)	6	15,467
Apprentice development role	6	30,934
		243,748

The apprentice development role will create a permanent role at Level 3 for the apprentice upon successful completion of the apprenticeship with the option to develop this role further in future years to Level 6. The additional cost of the structure will be £8,181 to Chorley Council with an equivalent saving to South Ribble Council. On reviewing the cash budgets of each service there is spend in previous years for external art working at South Ribble. As this can now be done in-house with the new team, further future savings are also likely to occur to South Ribble.

Proposed new structure



Wider position of team staffing budget

The proposals for changes to staffing structures focus on the communications team. This means that there will continue to be differential investment by the two councils in the event and museums teams. The table below illustrates that.

Funded by	Communications	Events	Museum, tourism and culture	Total
Chorley	£121,874	£84,788	£201,034	£407,696
South Ribble	£121,874		£25,916	£147,790

This will be reviewed in future reviews over the coming months as set out in the report.

Action Plan

Priority	Actions	Rationale	Timescales	Costs/ Savings	Implications (e.g. resource, risks)
Short-term					
Communications strategy	Develop a new strategy for each organisation to address issues identified	The creation of a shared team gives us an opportunity to review our approach across both organisations and ties in with the requirements of the AGS at South Ribble	October 2020		This will be a separate strategy for each organisation to take into account local circumstances and will need to be approved by each authority
Internal communications strategy	To review internal communications channels	To look at how we can take advantage of new technology and changing working practices during Covid-19 to better communicate with colleagues and councillors	October 2020		Upon completion of the strategy the team will need to embed this focus and prioritise the work to make sure the change is effective. Will need the buy in of each authority as it is not just a comms function – it is part of the culture.
Integration of in-house design service at South Ribble	To embed this in the organisation	There is a project to rebrand the organisation at South Ribble and this will be a key part of this priority. As will a review of self-serve tools for the service.	October 2020		Will need to balance implications for Chorley and how we can run a service across both authorities.
Digital channels review	To review our approach to how we utilise channels such as social media, emails etc.	The review identified this as an area for improvement and we need to review current practices and how we can improve our use of these as well as upskill the team.	November 2020		The findings may lead to the need for additional training and it will be important we use the most effective channel for each project we are working on.
Skills review	Agree areas for development in the team to meet the new challenges	Linked in to the item above we need to ensure the team has the skills to deliver the new way of working and each member of the team will consider what	January 2021		Will be dependent on what funding can be provided for training and appetite for team members to undertake it.

		development is required as part of the performance review process.			
Shared events team review	To develop a proposal for consolidating the delivery of events across both organisations into a single team.	To make the most of the shared service and to enable other teams to work more effectively this should be considered and all options explored.	October 2020		It has already been identified that the South Ribble events are delivered across several teams and additional resource may be required.
Medium/Longer Term					
Museums, tourism and culture review	To develop proposals for consideration	There is a need to create a permanent solution for the South Ribble Museum and Exhibition Centre and with other cultural projects progressing it needs to be considered where these will sit within the organisation once delivered.	March 2021		It is uncertain at this time whether adequate resource has been built into the ongoing budgets for these projects and the resource allocated is significantly different at each authority.
Initial review of changes	To reflect on changes that have been made and evaluate success	It is likely that the changes will create opportunities for smarter ways of working and so we need to review what has worked well and what hasn't and take into account any further impact of Covid-19 on communications channels	May 2021		For this to be successful we need to be clear on what we are looking to achieve.

APPENDIX B

Transformation and Partnerships Service Review

BACKGROUND

The Shared Transformation and Partnerships service is fundamental to driving the development of new operating models and coordinating organisational change to ensure sustainable public services for the future.

The service currently brings together core functions for effective corporate management and oversight including performance, partnerships, transformation (incorporating digital), organisational development and HR.

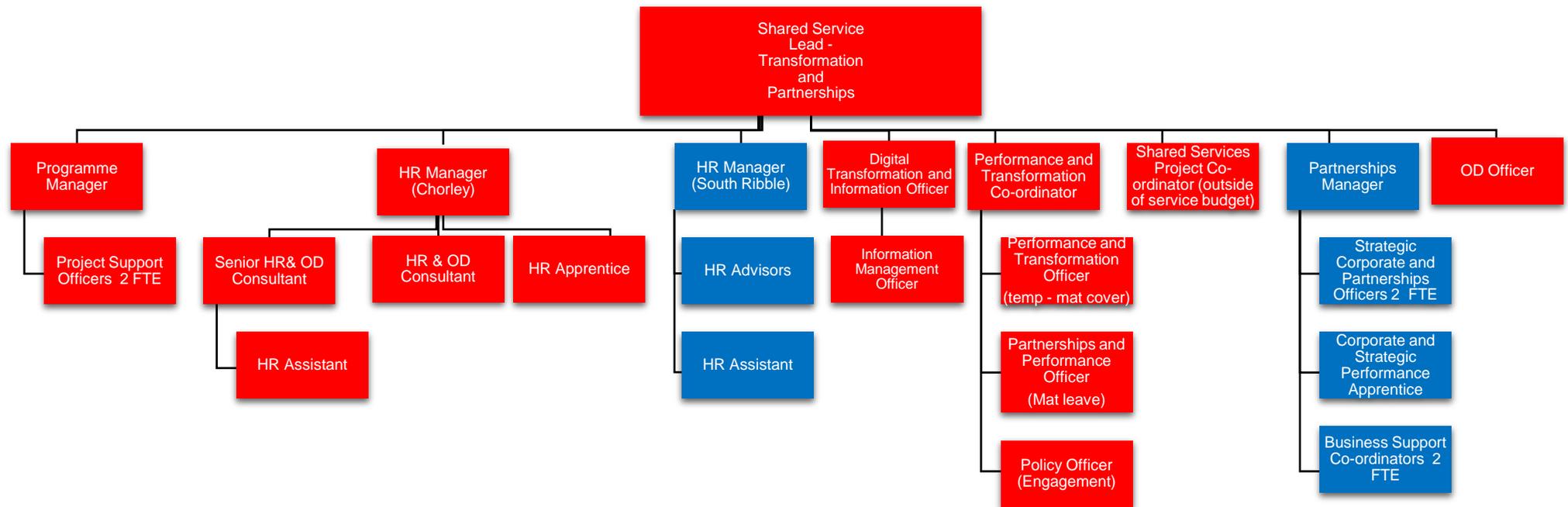
1. Current structure

Set out below is the current arrangements for the service, setting out the posts and funding from each council.

Staffing budget (£000)	Number of staff
902	25

South Ribble funded	Posts	Chorley funded	Posts
Performance and Partnerships	4	Performance and Partnerships	4
HR	3	HR	5
		Digital Transformation Officer	1
		Programme Management Office (PMO)	2
		Shared OD Officer	1
Vacancies	3	Vacancies	2

Transformation & Partnerships - As Is



2. Summary of key functions

Performance	Corporate performance management including strategy development, business planning, performance monitoring and reporting both internally and to members. Policy research, development and consultation.
Programme Management Office	Management and oversight of the corporate project portfolio through the application of a project management methodology.
Partnerships	Managing and coordinating the work of the strategic partnership forums, developing new ways of working with partners and driving wider public service reform.
Change and transformation	Designing, managing and coordinating delivery of organisational change activity to ensure financial sustainability, continuous improvement and a positive workforce culture.
HR	Delivering the full range of professional and transactional HR services as well as workforce health and wellbeing support.

3. Systems

Across the service a number of key line of business applications are in place to support delivery:

Function	Chorley	South Ribble
Performance	In house performance management system	InPhase
Project management	In house MyProjects system	InPhase
Consultation	Survey Monkey	Citizen Space
E-learning	Shared system	Shared system
HR	Provided by external partner	Provided by external partner
Performance review	In-house system	No system

APPROACH

The teams from Chorley and South Ribble now need to be aligned and further enhanced as part of a robust, modern, single operating model. The priorities for the review will be to:

- Ensure service resilience and address succession planning requirements
- Establish development opportunities for staff
- Review line management arrangements
- Deliver savings through reduced duplication, increased efficiency and management of existing vacancies

One of the first actions to achieve these priorities will be the reorganisation of the current team structure, which will be followed by other medium and long- term actions.

FINDINGS

1. Summary

The shared Transformation and Partnerships service should be the business unit that keeps the councils continually improving by developing strategy and designing delivery models to transfer organisational priorities into outcomes on the ground through the way the councils manage resources and performance.

The vision should be towards a single model that achieves:

- Robust performance and project management, providing strong corporate oversight and driving continuous organisational improvement so that the councils can be confident in their ability to deliver the outcomes of the Corporate Strategies.
- A coordinated approach to transformation to ensure financial sustainability, effectively managing change and supporting a positive organisational culture through workforce engagement and training.
- A modern HR service focused on strategic workforce development and consistent management practices enabled by shared systems and policies, automated transactional processes and greater self-service.
- Empowered staff, sharing skills and learning across a fully integrated and more resilient shared Transformation and Partnerships service led by a confident management team able to interpret the priorities of the organisation and direct activity on the ground.

The immediate priorities for the service will be:

- Developing a shared performance management framework including business planning process, shared Organisational Development Strategy and approach to consultation in response to the actions identified in the South Ribble Annual Governance Statement.
- Progressing the extension of shared services, implementing phase 1 and developing phase 2 including the wider programme of organisational change and benefits realisation.
- Delivering Corporate Strategy, transformation and key service improvement projects for both councils.
- Developing a shared HR team with a single HR policy framework, working towards a shared HR system that integrates payroll, personnel management and other functions by April 2022.
- Supporting and developing the work of the strategic partnership forums.

2. Challenges and opportunities

Function	Challenges	Opportunities
Performance and Partnerships	CC has an established performance team and a strong performance management culture whereas SR has a more recently formed team and approach to performance. Both teams work to similar performance management frameworks although there are opportunities for alignment and improvement.	Establish a shared performance team to work flexibly across both Councils to a shared performance management framework. The focus will be on robust processes (including business planning) and continuous improvement.
Programme Management	CC has a dedicated programme management office to lead and develop project management across the council. SR don't currently have any dedicated project management resource.	Given the focus on deliverability and a significant programme of large projects, the PMO would be shared across both councils to provide additional capacity to manage, deliver and monitor key corporate projects.
Strategic Partnerships	<p>Both councils operate strategic partnership forums; the Chorley Public Service Reform Partnership and the South Ribble Partnership. Over time both partnerships have developed successful initiatives and projects which should now form part of business as usual delivery to ensure longer term sustainability such as the South Ribble Integrated Team and Dementia Action Alliance.</p> <p>In terms of resource, SR has significant partnership working experience within the team and some resource focused on coordination whereas CC lack any dedicated resource.</p>	<p>Transition legacy elements into relevant service areas for ongoing delivery to allow the partnership to focus on strategic delivery.</p> <p>Strengthen officer capacity for strategic partnership working aligned to public service reform and to support the future development of the current partnership forums.</p>
Transformation and Change	CC have a transformation programme however resources to support the programme requirement alignment e.g. coordination, organisational development and digital expertise. SR don't currently have coordinated capacity for transformation and oversight sits primarily with senior leadership. A shared organisational development post has recently been established.	<p>Bring together resources to support organisational change and transformation as part of a single shared team with all elements of relevant expertise and additional capacity for coordination to drive project delivery across both councils.</p> <p>Develop an OD strategy for SR and review and refresh the current CC strategy to meet future organisational objectives.</p>

Learning and Development	Both councils have limited capacity for learning and development and no dedicated resource.	Invest in learning and development systems and additional capacity to support organisation wide training as part of a commitment to investing in the workforce and upskilling all managers and employees. Enhance the online offer to provide an engaging and effective employee experience as part of an agile training offer.
HR	The teams are similar in size although SR currently have a vacancy and CC host an apprentice, and deliver a mix of transactional and strategic HR. Both councils use different policies however a process of alignment has commenced to develop a shared policy framework based on best practice.	Establish a shared HR team working to a single policy framework. Undertake a programme of modernisation, working towards a shared HR management system with a focus on staff and manager self service for transactional elements, enabling the HR team to focus on adding value through strategic HR and workforce development.
Systems and processes	CC use mainly in-house developed performance and project management systems with no ongoing costs whereas SR have invested heavily in a commercial product. The contracts for the current HR systems that provide payroll and workforce management software are both due to expire in 2022 and will therefore require re-procuring.	Work towards shared systems as far as possible to ensure efficiency and consistency with dedicated capacity for system design, implementation and benefits realisation. Ensure sufficient capacity to lead, deliver and implement the shared HR system as a key enabler of future transformation.
Management	Currently there are service managers or team leaders for each of the functions along with a number of stand-alone posts (Digital Transformation Officer, OD Officer and graduate management trainee) which report into the shared service lead. Currently there are two HR managers, one for each authority.	Review line management to reduce duplication and achieve a more consistent ratio of direct reports to each line manager.

CONCLUSION

The service development approach will be phased with the first stage establishing a single service model that can respond flexibly to the needs of either council. Resources will be realigned to ensure that the right skills and capacity are in place to deliver key priorities, particularly in relation performance improvement and change programmes.

The second phase will follow a period of modernisation to achieve greater automation (including the implementation of a shared HR system), self-service and upskilling of the workforce to deliver the longer-term vision for the Transformation and Partnerships team.

This may present opportunities for further efficiencies through economies of scale and reduced duplication.

PROPOSED STRUCTURE FOR THE TRANSFORMATION AND PARTNERSHIPS SERVICE

The proposed structure will align resources to key areas of delivery and address any gaps in capacity to build resilience. It will also deal with inconsistent line management and provide opportunities for progression.

Shared teams will be established for each of the functional areas:

- Performance and Partnerships
- Transformation and Change
- Human Resources
- Programme Management Office

1. Management

Each team will have a team leader or manager reporting into the Service Lead. The four team leaders (Transformation and Change, Performance and Partnerships, HR and the PMO) and the Service Lead will form the service management team responsible for leading and delivering the service priorities.

2. Performance and Partnerships

The shared performance team will come together to provide flexible capacity for robust performance management across both councils.

A dedicated partnership coordination post will be established to support strategic partnership development. The post currently responsible for overseeing multi agency working (originating from partnership project activity) has now become a full-time requirement and will move over to take up an operational delivery role within the Neighbourhood and Development directorate.

The current Corporate and Strategic Apprentice post will be deleted and a Performance and Partnerships graduate trainee post will be established to provide additional capacity across the team; this type of role has proven to be a successful method of introducing new skills and growing talent to support future succession planning.

3. Transformation and Change

A central corporate Transformation and Change team will bring together the functions required to drive the councils' future transformation agenda aligned to the digital strategy and wider organisational change projects, particularly shared services. Resources will be focused around change management with the emphasis on staff engagement and building a positive culture. The presently vacant Digital Information Officer will be deleted, and an additional coordination post will be created to respond to the likely increase in activity related shared services phases one and two.

To support wider workforce development, the existing shared Organisational Development Officer post will be supplemented with a Learning and Development Coordinator post to enhance the training offer and maximise investment in the shared e-learning system.

4. HR

The HR team will be reshaped to create flexible support for both the professional and transactional elements of HR as well as focused capacity to support future change and modernisation, particularly looking towards the shared HR management system. Given the scale of this type of modernisation initiative and likely system change for both organisations, a senior HR transformation post will be established to ensure sufficient expertise and strategic direction. Management of HR will be streamlined through a single post to provide consistent vision and direction across both councils.

A full breakdown of the current and proposed structure including grading is included later in the report.

PROCESSES

Performance and Partnerships
<ul style="list-style-type: none">- A shared performance management framework will be developed including a consistent approach to business planning to be implemented at SR- A development plan will be prepared for the strategic partnerships to outline future opportunities and actions.
PMO
<ul style="list-style-type: none">- A consistent approach to project and programme management will be applied for both councils including a shared project management methodology and toolkit
HR
<ul style="list-style-type: none">- The shared HR policy framework is already in development
Change and transformation
<ul style="list-style-type: none">- A consistent approach to change management will be developed for both organisations- An OD Strategy will be developed for SR and the CC OD Strategy will be reviewed and refreshed

SYSTEMS

Shared systems will be developed as far as possible to support the single operating model and enable the further modernisation of the service. The shared HR management system is a priority and work has commenced to plan and scope the requirements. Performance and project management systems will also be reviewed and shared solutions put in place. The following principles will be applied when implementing new shared systems:

- The system should be a tool to support the process rather than driving it.
- A specification will be developed to define the digitation/automation that supports the shared process
- The system should be user intuitive and not require excessive administration resource
- Ongoing maintenance and development support will be key - whether in house or as part of a third party contract with a focus on value for money.

RECOMMENDATIONS

1. The action plan later in the document sets out a detailed development plan for the service, however the recommendations can be summarised as follows:
2. Undertake an initial reorganisation of the Transformation and Partnerships Service to align skills and capacity to achieve a fit for purpose single operating model that can respond flexibly to the needs of either council. This should:

- a) Group existing functions into shared teams with a team leader/manager: Performance and Partnerships, Transformation and Change, and HR, with a cross cutting PMO function
- b) Strengthen capacity for Performance and Partnerships by deleting one Corporate and Strategic Officer and creating a Strategic Partnership Officer; delete the vacant Corporate Strategic Apprentice post and establish a Performance and Partnerships graduate trainee.
- c) Transfer the current Business Support Officer post currently responsible for overseeing the delivery of multi agency working, including the South Ribble SRIT, to the Neighbourhoods and Development directorate. Delete the currently vacant second Business Support Officer post.
- d) Strengthen capacity for transformation and change by deleting the vacant Digital Information Officer post and creating a Transformation Coordination Officer. Also create an additional Transformation Graduate post to support future skills development in this area.
- e) Create a Learning and Development Coordinator post to supplement organisational development and maximise the training offer for staff.
- f) Reshape the HR team to align skills and capacity to transactional and project priorities. Delete the vacant HR Advisor post and strengthen capacity for HR modernisation and organisational change by creating a Principle HR Consultant responsible for advising on service change.
- g) Delete one HR Manager post and establish a shared HR Manager responsible for leading, managing and developing the shared HR function
- h) Approve the HR ERVS request subject to financial appraisal. This is to achieve succession planning and would avoid putting anyone else in the team at risk.

3. Implement shared policies and processes to ensure a consistent approach to service delivery.

4. Progress the review and implementation of key systems to enable further modernisation and efficiency in line with the principles set out.

FINANCIAL IMPLICATIONS

Structure As Is

Post	Currently funded by	Grade	FTE	Budget incl. on costs £
OD Officer	Shared	POB	1.00	46,251
Transformation Programme Co-ordinator	Chorley	SO2	1.00	40,441
Digital Transformation & Information Officer	Chorley	POB	1.00	46,251
Performance and Transformation Officer (Temp- Mat Cover)	Chorley	Sc4	1.00	26,889
Performance & Partnerships Officer	Chorley	POD	1.00	51,940
Policy Officer (Engagement)	Chorley	SO2	1.00	40,441
Partnership Manager	South Ribble	G08	1.00	43,145
Strategic Corporate and Partnerships Officer	South Ribble	G06	1.00	36,404
Strategic Corporate and Performance Officer	South Ribble	G06	1.00	36,404
Business Support Officer - VACANT	South Ribble	G06	1.00	38,738
Business Support Officer	South Ribble	G06	1.00	36,404
Corporate and strategic performance apprentice - VACANT	South Ribble	APP	1.00	-
Programme Manager	Chorley	POF	1.00	54,358
Project Support Officer	Chorley	Sc5	1.00	29,206
Project Support Officer - VACANT	Chorley	Sc4-6	1.00	33,729
HR Manager	South Ribble	G09	1.00	51,111
HR Advisor -VACANT	South Ribble	G07	0.88	37,718
HR Advisor	South Ribble	G07	1.00	39,913
HR Assistant	South Ribble	G03	1.00	25,672
HR Manager	Chorley	POE	1.00	51,940
Senior HR & OD Consultant	Chorley	POC	1.00	47,641
HR & OD Consultant	Chorley	POB	1.00	46,251
HR & OD Assistant	Chorley	Sc4	1.00	26,889
HR Apprentice	Chorley	APP	1.00	14,434
			23.88	902,172

Proposed Structure

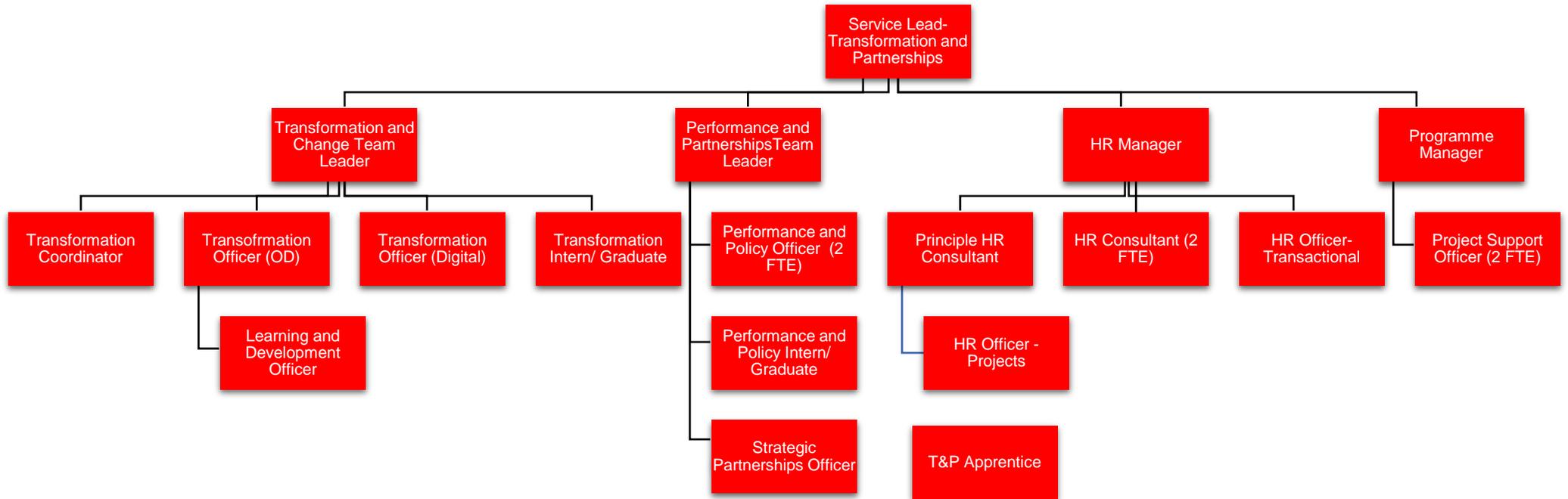
Post	GRADE	Budget incl. on costs £
Transformation and change team leader/manager	12	51,957
Transformation Coordinator	9	40,458
Transformation Officer (OD)	10	44,975
Transformation Officer (Digital)	11	46,268
Transformation Graduate – NEW POST	7	32,389
Performance and Partnerships team leader/manager	13	53,311
Performance and Policy Officer	9	40,458
Performance and Policy Officer	9	40,458
Performance and Policy Graduate – NEW POST	7	32,389
Strategic Partnerships officer	9	40,458
Programme Manager	13	54,672
Project Support Officer	6	29,223
Project Support Officer	6	29,223
HR Manager	15	60,575
Principal HR Consultant	13	53,311
HR Consultant	11	47,658
HR Consultant	11	47,658
HR Officer – Projects	6	29,223
HR Officer – Transactional	6	29,223
HR Apprentice		13,903
		817,468

Fixed Term Post to be Funded Through Reserves

Post	GRADE	Budget incl. on costs £
Learning and development officer – NEW POST Fixed Term 2 Years	5	26,355

Note that the PMO will be charged fully to Chorley and available on a 'per use' basis while this function becomes fully established.

Transformation & Partnerships – Proposed Structure



ACTION PLAN

Priority	Actions	Rationale	Timescales	Costs/ Savings	Implications (e.g. resource, risks)
Short-term					
Shared performance management	Develop a shared performance management framework and data quality policy	The development of a shared Performance Management Framework is identified as a priority within the South Ribble AGS. It is also critical to a successful single operating model	September 2020		The shared performance management framework will need to be embedded within both Councils as part of establishing a strong performance culture. This will be achieved through alignment with the business planning process for both councils.
Shared performance management	Bring together capacity for performance management	This team will be critical to building a strong performance culture, sharing knowledge, skills and best practice across both authorities.	Oct 2020		Additional resource will be built into the team to ensure capacity and resilience to deliver performance improvement across both councils.
Shared HR policy framework	Develop a shared HR policy framework	A shared policy framework is needed to align best practice and enable consistent workforce management through a single operating model. It is also highlighted as a priority within the South Ribble AGS.	December 2020		The shared HR policy framework is already in development with several policies approved. Staff and managers will need to be trained and supported with implementation.
Common approach to project management	Agree a shared approach to project management including consistent processes, tools and templates	A consistent approach to project management is needed to ensure effective delivery of the corporate strategies. The approach should provide structure, rigor, and corporate oversight.	October 2020		A Programme Management Office has recently been established at Chorley Council and this function will be utilised in SR to embed a consistent approach to project management as well as additional capacity to support the delivery of major projects from the client side.
Change and transformation	Strengthen resource for organisational	The longer term sustainability of council services will require continual improvement and	Dec 2020		Additional resource will be built into the structure to coordinate change and

	transformation by aligning relevant skills and functions.	transformation to make the most of available resources. Transformation resource will be brought together in a single team to enhance coordination, align digital expertise and organisational development capacity as a shared resource to support both councils.			transformation including the further development of shared services.
Change and transformation	Develop a shared Organisational Development Strategy	A shared Organisational Development strategy will support the culture and behaviour change, ensuring that staff have the confidence and skills to undertake their roles.	Dec 2020		Shared OD resource with South Ribble as part of the single operating model.
Learning and Development	Strengthen capacity for learning and development	Investing in staff and supporting personal development is critical to a strong organisational culture. Additional learning and development capacity will make sure that we're making best use of online learning systems to provide tailored training options for all staff.	Dec 2020		An additional post will be created to support and coordinate learning and development.
Strategic partnership working	Strengthen capacity for strategy partnership working.	Working differently with our partners to develop sustainable public services is a key priority for both councils. Dedicated capacity is needed to develop an drive forward strategic partnership working	Dec 2020		Dedicated resource and capacity will be built into the structure to facilitate strategic partnership working.
Medium/Longer Term					
Change and transformation	Develop a transformation strategy for South Ribble Council	A transformation strategy will be developed to support the programme of organisational change and improvement with a	Feb 2021		This strategy will need to align to the budget setting cycle for the council.

		focus on ensuring that the council can effectively deliver its priorities.			
Performance management systems	Shared performance management system	Commence a project to review existing systems and identify a fit for purpose solution for data collection and reporting.	Dec 2021	Unknown	The review and scoping for a shared system will inform whether a solution can be designed in-house or procured from the market. Its likely that this will over lap with project management systems and potentially a number of other corporate information systems e.g. risk management.
HR operating model	Develop the future HR operating model through a programme of modernisation	The implementation of the shared HR system will be one element of a wider programme of changes to support a modern HR operating model. Alongside the system, work will also need to be undertaken to upskill service leads and managers, supporting greater self service capability to enable a more strategic HR function.	Dec 2021		This work will take place throughout the implementation period to support skills development and behaviour change.
HR systems	Shared HR management system	Deliver a project to implement a shared HR management system that provides an integrated solution (including payroll) as part of a modern HR service.	April 2022	£50,000	This is significant piece of work that will require dedicated resource to scope, procure, develop and implement the shared system. The costs of the system will be dependent on the requirements and specification but have been estimated at £50,000 per annum with a view to increasing productivity and releasing future efficiencies.

Governance Service Review

BACKGROUND

The Governance Directorate contains the following services common to both Chorley and South Ribble Councils:

- Legal
- Procurement
- Democratic Services
- Elections
- Corporate Support
- Mayoralty
- Shared Assurance Services (to include Audit and Risk/Insurance).

There are also anomalies where services are included at one council but not the other:

- Civic Services (FM functions and Lancastrian)
- Licensing
- Land Charges
- Health and Safety

For many of the newly shared teams there are already similar approaches to the delivery of their functions however, for some, due to differences in approach between the councils and in relation to the actual functions they are asked to deliver, these approaches are quite different.

The final category are those teams already shared which include procurement and shared assurance.

Outside the current scope of this review are the cleaning services and FM functions at Chorley Council, and Land Charges and Licensing (other than the suggested immediate change) at South Ribble, although proposals will be brought forward in relation to them given the wider organisational implications.

1. Current structure

The current structure shows essentially two different teams with a complex management structure with senior officers (Director/ Service Lead / Assistant Director) having unclear or inappropriate reporting lines. The chart below shows the current structure but has incorporated some temporary management arrangements.

The tables below reflect the current establishment and the staffing costs associated with the teams.

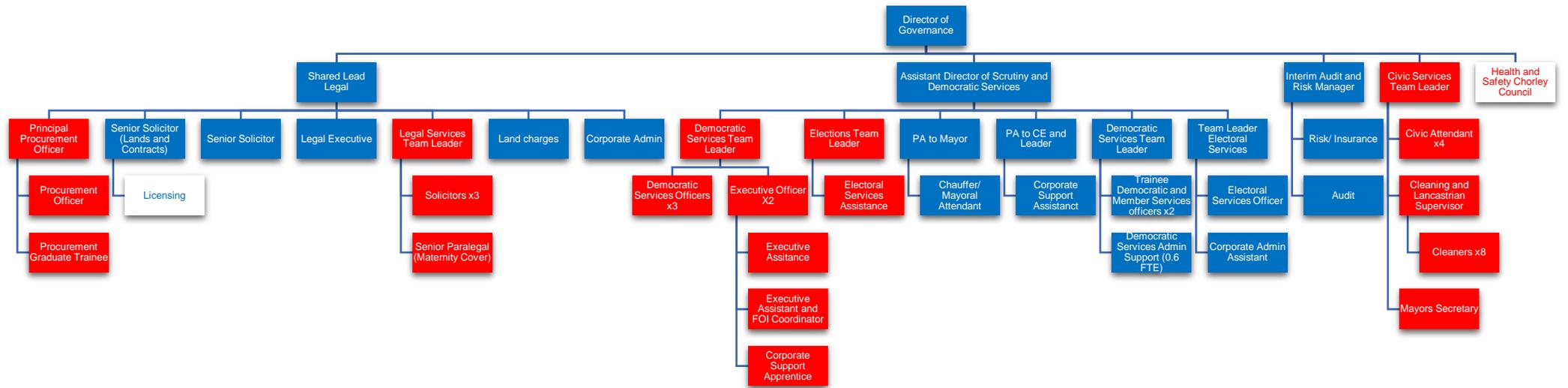
	Chorley	South Ribble
Legal Services	213,257	183,915
Procurement	69,557	69,557
Licensing	0	168,851
Democratic Services	130,245	172,896
Corporate Services	153,837	89,004
Electoral Services	81,033	87,238
Civic Services and Mayoralty	177,855	53,491
Audit	84,171	84,171
Risk and Insurance	52,776	52,776
Health and Safety	21,886	0
TOTAL	984,617	961,900

2. Summary of key functions

Legal	<ul style="list-style-type: none"> Council meetings Contracts Leases Property Transactions Section 106 agreements Enforcement to include prosecutions Civil litigation Briefing of Counsel Advice on Council processes and the constitution Support for procurement processes both statutory and under the councils' contract procedure rules.
Democratic Services and Elections	<ul style="list-style-type: none"> Meeting support and delivery Member support and development Elections Electoral registration Mayoral Support Meeting FM Support Admin Support PA support to CE, Leader, Directors and Senior Officers FOI / DPA response co-ordination Lancastrian bookings and FM functions
Assurance Services	<ul style="list-style-type: none"> Internal Audit Risk Management Emergency Planning Business Continuity Insurance

The current structure of the services is set out below.

Current structure



3. Systems

There are a number of key lines of business applications in place across the directorate, which are summarised below.

Service	Chorley	South Ribble
Legal	<ul style="list-style-type: none">• IKEN case management system• No contract management system• Joint online law library already procured	<ul style="list-style-type: none">• No case management system• In house developed contract management system• Joint online law library already procured
Democratic Services and Elections	<ul style="list-style-type: none">• ModernGov• EROS	<ul style="list-style-type: none">• ModernGov• EROS
Assurance Services	<ul style="list-style-type: none">• Connie (Business Continuity)• Grace (Risk Management)• MyProject – in house system for management of audit actions	<ul style="list-style-type: none">• Connie (Business Continuity)• Grace (Risk Management)

APPROACH

The focus of this review is on identifying an action plan for transformation and change to create robust and sustainable shared services. The staffing changes at this point focus on areas that will support that change, with further changes planned over the coming year.

FINDINGS

1. Summary

Whilst there is still a need to work across two sites to support two sovereign organisations there is no reason why this cannot be done by a single team. Team leaders would be well placed to manage resources across the two main working bases where onsite provision is needed and the improved technology solutions mean that much of the support services can be delivered remotely in any event.

The ideal is to be in a position that whilst staff may work out of a single base location, they are able to easily go to work where it is necessary, using common systems and processes.

For much of the teams being reviewed there is already a consistent method of service delivery:

- Elections and Democratic Services both use the same IT systems and have similar team sizes and functions.
- Legal Services similarly deliver work in similar areas and whilst there is currently a difference in relation to the case management system the decision has already been taken to use/develop an inhouse solution.
- Corporate Support largely offer the same services and use the same systems so there are significant commonalities to build on.

2. Challenges and opportunities

There are some slight differences in service delivery which reflect the different approaches of the council:

- In corporate support there are differences in the allocation of work, and functions delivered i.e. allocation as PAs and the FOI /DPA co-ordinator role.
- Admin Support is delivered differently with it being centralised at Chorley Council and placed within teams at South Ribble Borough Council.
- The mayoralty is delivered in different ways at the authorities
- Civic services have FM functions at Chorley Council.

In addition, there are some organisational barriers:

- IT systems integration are fundamental to enable cross site working. At present there remain issues around this which prevent or at least reduce the efficiency of the shared service
- Process differences: Whilst many of the procedures and approaches by the authorities are the same or similar, differences (and unfamiliarity with those differences) can increase risk levels and lead to inefficiencies.

The greatest opportunity is to improve the resilience of the services. All the teams are relatively small numbers so unexpected staff absences can have significant issues in terms of performance but also staff wellbeing and morale. Such absences are more easily absorbed in larger teams.

A larger team structure also tends to offer greater opportunities for development and improved experiences for team members.

Many of the teams within this directorate would look to automate similar processes. Previously, development work to support such improvements may not been seen as a priority due to the low potential impact. However, with the greater team sizes and the likely similarity of the process needs the benefit of this work increases. Further, it is likely that such work would be capable of being shared more widely across both organisations with processes developed being capable of adoption by other teams with little change to meet their individual needs. Similarly, existing developed solutions could be adapted for team use.

RECOMMENDATIONS

1. Undertake an initial change to the structure to simplify management lines, create consistency and enable the delivery of a single operating model. The elements of the initial restructure of particular note include:

- The management of Shared Assurance Services. The assurance team lacks strong management at a senior enough level to ensure that both organisations are supported by effective audit and assurance functions. Therefore, there is a proposal that the councils should invest in the creation of a Service Lead Audit and Risk (Chief Internal Auditor) post. This will support the councils in maintaining strong internal governance frameworks.

Other changes in the team will include deleting the vacant Principal Auditor and two part time Auditor posts and the creation of a Senior Auditor and Auditor posts, which will provide sufficient resource to meet the needs of the councils.

- The proposal for Legal Services is to create a new, additional Team Leader post for the team splitting the direct reports. It is intended that the teams will provide a lead for key aspects of the service's work. These specialisms and arrangements will be developed with the team as set in the action plan below.
 - There has been no decision as to the location of the licensing service at SRBC as part of this review. This will be considered as part of the proposals for phase two shared services. It is proposed that for the short term that the current management arrangement where the Licensing team are managed by a senior solicitor continue with an honorarium paid to bring the salary of this post up to team leader level of circa. £4k which is the pro rata differential to team leader post of the senior solicitor.
 - In relation to democratic services, the vacant Democratic Service Team Leader post at SRBC is to be deleted and replaced with at DSO level post. This will enable a single team leader post across the organisations.
 - At this stage it is not proposed to make significant changes to Corporate Support. The structure brings all admin functions to sit within this team, but any line management can be picked up in existing resources due to the existing posts already having staffing responsibilities. A detailed review of corporate support will be undertaken as set out in the action plan.
2. Undertake a review of corporate support to consider the resource need following implementation of further shared services; the potential to centralise corporate support functions; alignment of processes; and efficiencies from increased use of IT systems
 3. Undertake a detailed review of the civic services function, in particular to consider, facilities management, meeting support and Lancastrian Suite at Chorley Town Hall. The aim of the review is aligning approaches across the organisations and ensuring that functions are delivered by the correct teams
 4. Review the elections function to establish the approach to be taken to shared services without disruption preparation and planning for elections within the next 12 months.

FINANCIAL IMPLICATIONS

POSTS DELETED	Grade	POSTS CREATED	Grade
Assistant Director of Scrutiny and Democratic Services	T-4	Service Lead – Democratic and Electoral Services	T-4
Governance and Member Services Team Leader	G08	Democratic and Member Services Team Leader	11
Democratic Services Team Leader	PO-D	Democratic Services Officer	9
Senior Solicitor (0.91 FTE)	GO-8	Legal Services Team Leader	15
Solicitor/Senior Solicitor x4	GO-8/ PO-E	Senior Solicitor x4	12

Principal Auditor	G08	Service Lead – Audit and Risk	T-4
Auditor 0.4 FTE	G06	Senior Auditor	9
Auditor 0.8 FTE x2	G06	Auditor	8
		Senior Solicitor honorarium for line managing Licensing Team	n/a

As a result of adopting the new proposed pay grades some posts will need adjustment to be on parity with colleagues or to reflect where old grades do not directly align with new. The table below shows the posts effected and the cost.

Post	SCP change caused by changing top of grade (from to)	Increase cost (£)
Civic Attendants (CBC) x4	11 up to 12	2,000 (plus on costs)

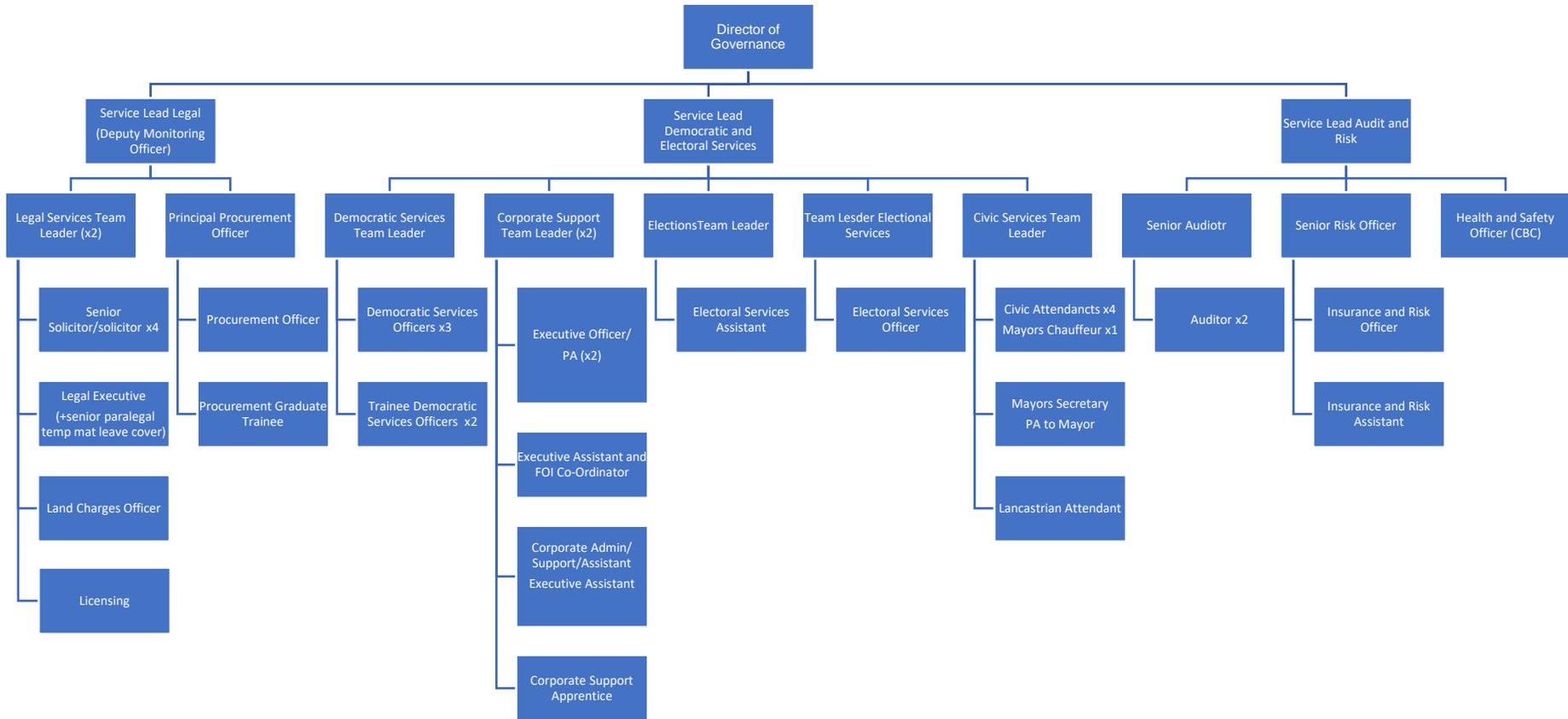
Cost of New Establishment

	Chorley	South Ribble
Legal Services	194,658	194,658
Procurement	69,820	69,820
Licensing	0	113,138
Democratic Services	152,828	152,828
Corporate Services	137,788	137,788
Electoral Services	87,447	87,447
Civic Services and Mayoralty	116,886	116,886
Audit	92,277	92,277
Risk and Insurance	54,275	54,275
Health and Safety	47,836	0
TOTAL	953,813	1,019,115

Original Budget	984,617	961,900
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(Savings)/Increased Budget	(30,803)	57,215
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Proposed structure chart:



ACTION PLAN

Priority	Actions	Timescales	Costs/ Savings
High	Initial structure Changes Detailed above	Immediate	
High	Cancel IKEN contract	Immediate	£7k capital saving to SRBC for implementation costs £1.5k Revenue saving
Medium	Review of Corporate Support provision To include <ul style="list-style-type: none"> • Resource need following implementation of further shared services • Centralisation of corporate support functions • Alignment of processes • Efficiencies from increased use of IT systems 	Continuing will be undertaken as functions change depending on changes to the CE role and other shared service changes	Expected circa £30k (1 post)
Medium	Review management of South Ribble licensing function To include <ul style="list-style-type: none"> • Consideration of Licensing functions and provision • Reallocation of functions within Council • Management of teams • Location of functions 	To be aligned with shared services phase 2	zero
Medium	Review of Civics Functions <ul style="list-style-type: none"> • Provision of shared mayoral services • Reallocation of Facilities management functions • Consideration of management of Lancastrian Suite. 	To commence in October	Circa £45k (equivalent to 1.5 posts)
Medium	Review of legal services <ul style="list-style-type: none"> • Weighting of resourcing and expertise to reflect business need of councils • Grouping of functions to enable specialisms • Land Charges 	To commence in 2021	£10k
Medium	Reduction in Shared Audit and Risk – transactional work to be undertaken by Corp Support or technology	At end of Grad Trainee Contract	£25k
Total			£110k

