

Report of	Meeting	Date
Deputy Chief Executive	Shared Services Joint Committee	Thursday, 3 February 2022

Shared Services Monitoring

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 current shared services between Chorley and South Ribble Councils, monitoring staff satisfaction, savings and benefits, alongside progression against the service development objectives.

Recommendations

2. To note the update on shared services and the service development objectives for the phase 1 services.
3. To consider the approach for monitoring shared services arrangements moving forwards.

Reasons for recommendations

4. To allow for more frequent reporting on the shared services arrangements between Chorley and South Ribble Council, allowing the Committee to regularly monitor progress and performance.

Background to the report

5. Chorley and South Ribble Councils agreed the phase 1 extension of shared services arrangements in September 2019 to include Transformation and Partnerships, Communications and Visitor Economy, and Governance services. In January 2020, shared senior roles were implemented, followed by phase 1 services in April that year. Restructures for the services were completed in November 2020.

Shared services monitoring

6. In June 2021, the first shared services monitoring report was presented to the Shared Services Joint Committee to assess the position of phase 1 services in relation to:
 - a) Progression against service development objectives
 - b) Staff satisfaction
 - c) Benefits tracker
 - d) Risk review
 - e) Budget overview
7. The reports are currently scheduled to be shared with the Committee every six months, with the second update presented to the Committee in this report. The attached paper in appendix A considers the savings and budget split for phase 1 sharing arrangements, alongside phase 2 savings that have already been delivered. Staff satisfaction and service level benefits and objectives have been identified for each of the phase 1 services and monitoring in these areas will be expanded to other shared services once the restructures have been implemented.
8. This report also includes a benefits tracker in appendix B and best practice paper in appendix C to highlight some of the benefits that have been delivered as a result of shared services.
9. As more services become shared, with ICT and Customer Services reviews due to be implemented in Q3 and Q4 2021/22, a review of the Shared Services monitoring framework has been undertaken to enable more frequent and regular updates to Shared Services Joint Committee. This will allow the Committee to better monitor the progress and performance of both established and evolving shared services. It is suggested that this reporting should also include Shared Financial Services to provide an overview of progress across all shared services.
10. The review has also considered how benefits realisation can be more comprehensive and quantify the benefits that have been achieved alongside developing an understanding of the successes and examples of best practice from the services.
11. It is proposed that future reporting follows the framework set out below in place of the current bi-annual monitoring reports:

Report	Content
Every meeting – general update report	Highlight report with update from each service on key points of action and an overview of activity
Quarterly performance report	For each service, updates on: <ul style="list-style-type: none">• Service development objectives• Service performance against measures outlined in the service business plan• Benefits overview

	<ul style="list-style-type: none"> • Staff satisfaction (staff will be surveyed every other quarter) • Risk register
Annual review	Full review of <ul style="list-style-type: none"> • Benefits realisation including quantitative performance • Best practice • Areas of success and achievements • Lessons learned • Financial benefits and budget

12. Progress of each service will be monitored in relation to measures outlined in the service business plans, alongside the key benefits identified within the original business case for shared services and the Project Initiation Documents:

- a) Financial savings
- b) Resilience and capacity
- c) Service development
- d) Staff development

13. Meeting dates for Shared Services Joint Committee are set until March 2022. General update reports will be taken to every meeting moving forwards and will be included in the timetable once meeting dates have been confirmed.

14. It is proposed that quarterly updates are reported in June, September and December. The annual benefits realisation will be completed in March, with this first being completed in March 2023 once ICT and Customer Services have been implemented with time for progress to have been made on the service development plans.

15. The suggested forward plan for the meetings is as follows and will be updated with general update reports once the full forward plan is set.

Meeting	Reporting
June 2022	Quarterly performance report
September 2022	Quarterly performance report
December 2022	Quarterly performance report
March 2023	Annual review

Climate change and air quality

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

Risk

17. Risk for shared service is considered within the appendix report.

Comments of the Statutory Finance Officer

18. Details of savings approved to date and current Shared Service budgets are included within appendix A.

Comments of the Monitoring Officer

19. There are no issues to raise from a Monitoring Officer perspective.

Appendices

Appendix A- Shared Services Monitoring Report

Appendix B- Benefits Tracker

Appendix C- Best Practice

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