

# Collaborative Transformation

## Magazine

Essential collaborative transformation skills for public sector leaders and managers

## COLLABORATIVE LEADERSHIP AFTER THE BALLOT BOX



- Accelerating collaborative transformation in the Health Service
- A tool to help the leadership in Social Housing work together for better outcomes
- Does local government have sufficient internal trust to handle combined authority working?
- A four stage journey tool for collaborative commissioning

### Highway Code Updates For Your Folder

- Update on combined authorities
- Developing a communications strategy at each stage of the collaboration journey map
- What is the optimal number of partners for collaborative working?
- Changes in the VAT restrictions on private sector shared service providers

### Update On The Rapid Progress Of Blue Light Collaborations

Fire service ambulances, co-located police and fire stations, illustrate the blurring of boundaries between the three services...

### The SSA Tools Are Now Available Online



#### TAKING CO-PRODUCTION INTO THE MAINSTREAM

Colin Daysh, SSA, reviews the application of co-production to bolster communities.



#### STAFFS & WEST MIDLANDS SHARED FIRE CONTROL

Becci Bryant, SSA, provides a case study of a collaborative approach to fire control services



#### NOTHING ABOUT US WITHOUT US!

Tom Alexander, SSA, on collaborative commissioning across the community



**What did the  
successful candidate  
have on their CV  
that you didn't?**

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Canterbury Christ Church University Business School, in partnership with Shared Service Architecture, established the UK's first postgraduate qualification in public sector Shared Service working in 2010.

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This course provides you with the knowledge and skills to initiate and develop collaborative transformation and shared service projects, whilst also giving you a valuable postgraduate qualification. You will become a skilled and valuable in-house resource, able to cascade your learned skills across colleagues in collaborative transformation activities.

**[Visit www.sharedservicearchitects.co.uk](http://www.sharedservicearchitects.co.uk)**

Or email Dr Wim van Vuuren, Programme Director  
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**Applications are now open for the October 2015 cohort**



## A NEW NAME TO KEEP PACE WITH A CHANGING LANDSCAPE...



### Why has the name of your magazine changed?

Shared services, whilst still important, are becoming a background activity to the billions of pounds of savings predicted for combined authorities, city deals, blue light transformations, systems-wide collaborations and the blurring of health and social care.

All the UK Governments wants them to happen, and all will demand the skills of collaborative working to transform the current methods of delivery.

To help you in this rapidly accelerating, collaborative transformation landscape, we have refocused your practitioner magazine to cover the wide range of activities, including shared services, that fall within it.

In addition, the Postgraduate Certificate in Shared Services at Canterbury Christ Church University has been renamed the Postgraduate Certificate in Collaborative Transformation. It will widen its focus beyond shared services to include, for example, combined authorities and health and social care.

We recognise your world is changing and we want to help your skills and knowledge keep pace with the change, so that you can be successful in your work on any collaborative transformation, including shared services.

Dominic Macdonald-Wallace

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# HAVE YOU REGISTERED AS A SHARED SERVICE PRACTITIONER?

If you have attended the Shared Service Practitioner's programme seminars you are entitled to register as a Shared Service Practitioner - SS(PRAC)<sup>TM</sup>

**SS(PRAC)\*** signifies that, as a recognised Shared Service Practitioner, you are equipped with a range of over 100 tools, templates and techniques to support collaborative transformation and shared service projects using the *Shared Service Architect*<sup>®</sup> methodology.

**SS(PRAC)\*** also indicates that you have stepped into the initial module of the Postgraduate Certificate In Collaborative Transformation\* at Canterbury Christ Church University.

Successfully completing the postgraduate certificate leads to recognition as a Shared Service Architect with permission to use SSA<sup>TM</sup> post-nominal letters. SSAs are most likely to be selected to lead collaboration projects.



To find out more about the  
Shared Service Practitioner Programme  
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\* Acceptance on the Postgraduate Certificate in Collaborative Transformation is subject to approval by the university.

## YOUR SSA™ OR SS(PRAC)™ RECOGNITION CAN NOW BE FREE!

*More importantly, at job interview it is being used as a competitive edge. Large numbers of public sector employers are interested in candidates who can evidence skills development in collaborative transformation and shared services.*

During the last five years, over 2,000 senior managers and leaders have attended at least one of our Shared Service or Collaborative Leadership sessions.

Over 300 have gone on to become eligible for Shared Service Practitioner recognition, and over 100 are eligible for Shared Service Architect recognition. Since January 2015 another 40 have become eligible too.

This entitles them to use the post-nominal letters SS(PRAC)™ and SSA™ in their email signature and business cards, and join the online community to share good practice.

More importantly, at job interview it is being used as a competitive edge. Large numbers of public sector employers are interested in candidates who can evidence skills development in collaborative transformation and shared services.

### **There's no money left...**

In these times of austerity, many organisations have stopped funding the professional fees of their employees.

Therefore, we have introduced five new options for SSAs and SS(PRAC)s to renew their annual membership as an alternative to paying an annual fee of £199+vat.

The options are centred around contributing to the Shared Service Architecture body of knowledge and increasing practitioner numbers.

### **For example, the first option is submitting an annual article to this magazine.**

Our SSAs and SS(PRAC)s have excellent examples of good practice that they should be sharing with others. This magazine provides a platform for them to share that knowledge in a structured way.

You can see in this edition of the magazine that already many of our practitioners are taking up this option. They will be fully credited with writing the article and instead of paying a renewal fee for continued SSA or SS(PRAC) recognition, the copyright of the article will transfer to Shared Service Architecture Ltd.

### **Swapping tools for renewal...**

A second option is submitting a new collaboration tool for publication.

The purpose of the SSA Toolboxes is to inspire users to develop new and better tools. Therefore, if you are an SSA or SS(PRAC) you can put forward a tool, template or technique you have developed, to be included in the online toolkit, or in future published toolkits.

Full acknowledgement for the tool will go to you, the copyright of the tool, template or technique will transfer to Shared Service Architecture Ltd, as an alternative to you paying your annual recognition fee.

If you would like to read more about all the options and how they might work in practice, please visit:

[www.sharedservicearchitects.co.uk/Annual-Renewal-of-Recognition](http://www.sharedservicearchitects.co.uk/Annual-Renewal-of-Recognition)



## Meet some of our recently registered Shared Service Architects and Practitioners

A recognised Shared Service Practitioner - SS(PRAC)<sup>™</sup> - has attended the three workshops in the Shared Service Practitioner Programme. To become a recognised Shared Service Architect, - SSA<sup>™</sup>, you will have graduated from either the Postgraduate Certificate in Collaborative Transformation (formerly Shared Services), or Postgraduate Certificate in Collaborative Leadership, or you are an SS(PRAC)<sup>™</sup> who already holds an equivalent postgraduate qualification.



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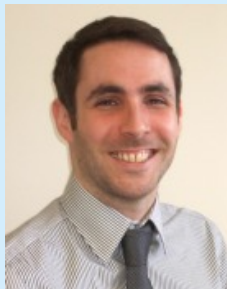
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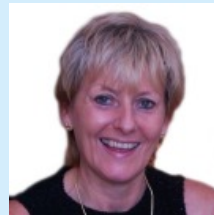
If you believe you qualify for SSA™ or SS(PRAC)™ recognition, but have not received your certification please contact Lucie Hanuskova. Lucie will help you to register.

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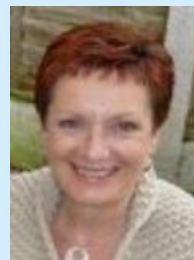
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# NOTHING ABOUT US, WITHOUT US!

## Collaborative Commissioning Across The Community



**Tom Alexander SSA**  
Programme Manager  
(New delivery models)  
at London Borough of  
Sutton

For my sins, I am a commissioning purist and this means I fundamentally believe in the message enshrined in the Valuing People White Paper (2001) *Nothing About Us Without Us*<sup>1</sup>. For the uninitiated, the paper was crucial in transforming provision of services to adults with learning disabilities.

It obliged commissioners to ensure all decisions had full involvement from people using services and their families. I have seen lives change for the better as a result of this collaboration.

Things aren't perfect but they are better and, having seen the power of this concept, I make no secret about adopting it in every commissioning exercise I undertake.

At Sutton Council, we have a strong record of involving local people in shaping and evaluating services and so I have tried to draw on that experience to put together a range of ways people can be involved that really add value to both the process and the outcome, along with questions commissioners can reflect upon to help do that.

Oh, and to avoid triggering the inevitable discussion over whether we mean residents or citizens or service users, I have stuck with "people"!

### Collaborative commissioning is hard!

Collaborative commissioning is hard. It can be really hard and it goes wrong if you don't manage expectations (isn't that equally true when working with colleagues?) however the value it adds when it goes right is so significant it is worth persisting. There is a myth that people don't care about this stuff but they do, and here are some examples:

- People with profound communication difficulties told me passionately what they wanted instead of a day centre.

- Young people are telling me very clearly what they think of our services and how to improve them without spending more.
- Local people are focused on what they would like to see happen to their local park, and are coming up with the answers.

My job as a commissioner isn't to decide if I listen but to help them take control and yes, be there if it starts to go wrong.

### The eight steps of the journey that make it easier...

In the table on the next page, I have set out eight steps of the collaborative commissioning journey that will help make your collaborative commissioning smoother. Also, I have added example SSA tools that can help you at these stages.

The eight steps are part of four standard stages of project activity that you will recognise:

- Analyse
- Plan
- Do
- Review

**Analyse's** two steps are *Initiate* and *Investigate*. This is setting context and preparing for your journey. It's about gaining and understanding what information and intelligence can be provided by local people and how they can help you corroborate or disprove ideas. It is also crucially about agreeing parameters.

**Plan's** two steps are *Collaborate* and *Incubate*. In these steps, you empower local people to shape, validate and localise potential interventions.

**Do's** two steps are *Negotiate* and *Activate*. It is important to ensure that people's voices are heard by the commissioners and the market, and acted upon.

This is possibly the most crucial stage and where your collaborative commissioning can be derailed.

<sup>1</sup> DOH (2001) *Nothing About Us Without Us*. London. Department of Health. The website is now archived. Visit the [SSA Online Library](#) to download the PDF.



## The Four Stage Journey For Collaborative Commissioning

	Commissioning Step	Principle	Practice Question	Related SSA Tools*
Analyse	Initiate	Local people are a great source of information and intelligence.	How can local people help collect information and intelligence as well as provide it?	CLA1.01 CLA2.03 CLA2.05
	Investigate	Local people are well placed to corroborate or disprove evidence and add narrative.	How have local people contributed to the analysis?	CLA4.01 CLA4.02 CLA4.03
Plan	Collaborate	Local people want to shape the service they receive.	Is collaboration with local people demonstrable in your plans?	T&V1.03 T&V1.03 T&V3.08 CLA5.01
	Incubate	Local people help validate and localise any initial plans.	To what extent is any initial plan reflective of local people's needs and do they agree?	T&V4.01 CLA4.01 CLA8.01
Do	Negotiate	Local people's voices must be heard by commissioners and potential providers.	What evidence is available to indicate that local people feel they have influenced the process?	CLA4.02
	Activate	Local people provide crucial insight into potential solutions and provision.	What facets of the eventual solution are directly attributable to local people?	CLA6.01 CLA6.02 CLA6.03
Review	Consolidate	Local people are well positioned to help gather data (particularly primary data).	How can local people collect data as well as provide it?	CLA4.01 CLA4.02 CAL4.03
	Evaluate	Local people should contribute to the evaluation of the service.	Does the evaluation include feedback from local people on the commissioning process as well as any outcomes?	CLA8.01

\* CLA Tools can be found in the [SSA Collaborative Leadership Across Communities](#) Toolbox

\* T&V Tools can be found in the [SSA Trust & Shared Vision](#) Toolbox

Commissioners may not like what they hear from people and be tempted to ignore it.

Also, potential providers may not like it. Often their preference is to save costs by importing an 'off the shelf' way of doing things into the locality.

You must work with the commissioners and providers to ensure that the people's voice has been heard and is seen in the delivery. Otherwise, the people will walk away and any further collaborative commissioning will be tarnished as just a shallow consultation exercise.

**Review's** two steps are *Consolidate* and *Evaluate*. Setting up the new service is not the end of the journey. It is just the beginning and you need to engage the people to help embed, operate and improve new ways of delivering their service in collaboration with the service providers and your commissioning managers.

Ongoing gateway reviews, surveys and back to the floor exercises will prove helpful.

### How can the Commissioning Academy help you?

I developed my thinking about genuinely involving local people during my time on the Commissioning Academy programme. If you are involved in commissioning, then I would recommend you consider attending.

It gave me the opportunity to deepen my understanding of commissioning and reminded me how many innovative and inspiring people work in the public sector.

You can find out more about the Commissioning Academy at [www.gov.uk/government/collections/commissioning-academy](http://www.gov.uk/government/collections/commissioning-academy)

# IS SOCIAL HOUSING READY TO PUT ASIDE ITS GUILTY PLEASURE?



**Sharon Collins SSA** is a Housing Specialist and has created a strategic tool to understand the pre-requisite business appetite for a collaborative solution.

There's a huge housing crisis in the UK.

For decades, the UK has failed to build enough new homes; supply is not in any way keeping up with demand, many adults still live with parents in overcrowded homes with many more families struggling to afford to keep a roof over their heads, or becoming homeless.

Set this in the context of strengthening austerity measures, cuts in government housing grant, the growing impact of Welfare Reform with more still to come, and you find yourself operating in a challenging new state of 'normal'.

## **Make, buy or share...**

In September 2014, I published a thought leadership paper in partnership with HouseMark (who are owned by the National Housing Federation and Chartered Institute of Housing) into the need for the sector to rethink how it can generate greater social value and deliver on value for money by working more collaboratively.

The paper provides research and debate through illustration of 'early adopters'. This is helping to begin a conversation with sector leaders, to enable the next generation of regional collaborative service delivery models, utilising the VAT efficiencies and wider benefits of cost sharing groups, as a key enabler of collaborative transformational change.

My concern is that the housing sector's current response to this challenging operating environment is to deploy the same old tried and tested strategies to mitigate risk and build business resilience.

But, how can we continue to use yesterday's solutions in an operating environment when radically new solutions are needed to solve increasingly complex problems?



The sector seems so focused on its 'guilty pleasure' of remaining autonomous independent businesses, that it's lost sight of the need to fundamentally rethink the shape of operating models and traditional service and sector boundaries.

It doesn't make sense for 2,000+ housing organisations - all with similar core values and strategic intent, operating shoulder to shoulder within regions - to maintain traditional service boundaries and operating models which duplicate spend within the same communities.

## **Testing the market appetite to share**

For my postgraduate Shared Service Architect qualification, I studied the pre-requisite market conditions required before collaborative advantage can emerge as a viable strategic option.

It was a fascinating area to study as it delved into hidden need and tried to find answers to the Donald Rumsfeld conundrum of 'not knowing what you don't know'. It kept me out of mischief for months!

*I truly believe that by re-imagining operating models will be able to sustain and support some of the most vulnerable people in society by freeing up capacity to build more homes, enabling families and individuals to flourish.*

The research evidenced that there are key drivers that, if present, are more successfully satisfied through collaboration than by solo working. These drivers are now present in the housing market, but are not being recognised.

So, in my consultancy work, travelling the country, I have decided to get on my soap box and take this debate to sector leaders.

To do this I developed the simple, effective, high-level questionnaire tool on the following page to help understand the market appetite to collaborate. I wanted to share it with you as a contribution to the Shared Service Architect's body of knowledge.

The tool tests market appetite for collaboration across three different metrics:

- economic drivers,
- strategic intent, and the
- imperative to improve.

So far, the questionnaire has proved invaluable in understanding the tipping point of whether a collaborative strategy is viable in terms of leadership and board appetite.

Because, let's face it, they are the people who have to stay in the room, both mentally and physically, if collaborative advantage strategies are to be successful.

I absolutely believe that future business advantage, or even survival, will go to organisations which can stimulate and support business-to-business collaboration.

This could be by re-imagining service delivery, by cutting across traditional service and sector boundaries or, more simply, by working in a collaborative partnership with like-minded organisations to deliver front or back office services.

I'm passionate to take this debate forward, because by working together I truly believe that by re-imagining operating models we will be able to sustain and support some of the most vulnerable people in society by freeing up capacity to build more homes, enabling families and individuals to flourish.

### How to use the "Market Appetite For Collaboration Tool"

This effective, high level tool tests market appetite for collaboration across three different metrics:

- economic drivers,
- strategic intent, and the
- imperative to improve

So far the questionnaire has proved invaluable in understanding the tipping point of whether a collaborative strategy is viable in terms of leadership and board appetite.

To use this tool, simply:

1. Mix participants into small discussion groups.
2. Ask each individual to complete a questionnaire alone, and then chat about their findings in pairs.
3. Facilitate feedback discussion and debate from each table, while a colleague collects completed sheets and totals the scores for each metric.
4. Voilà! You better understand strategic appetite, drivers and barriers to collaborate.

You can download the Make, Buy or Share thought leadership paper from [www.collinscorporatesolutions.co.uk](http://www.collinscorporatesolutions.co.uk) or join the debate on Twitter #CollaborateDebate

# Understanding Collaborative Appetite

Market conditions	Yes	No	Maybe
<b>1. Are there clear cut economic drivers to collaborate through...?</b>			
Is there a focus on cost reduction and/or greater efficiency?			
Are plans impeded by a lack of organisational scale?			
Is there clear drive to reduce financial risks?			

<b>2. Is there clear strategic intent to seek new/resilient markets through...</b>			
... product/service development?			
... consolidation?			
... cessation?			
... diversification?			

<b>3. Is there an organisation imperative to improve...</b>			
... performance and protect quality?			
... agility or flexibility?			
... service resilience?			
... or take action to overcome regulatory, policy or political barriers?			

1. Is there an openness towards the principle of sharing both at Board and Executive level?
2. What do you see as the biggest benefits to collaborate?
3. What do you see as the biggest barriers to collaboration efforts?
4. Where are you in your collaboration journey?

Please complete and leave this questionnaire for collection on your tables. Thank you.

# COLLABORATIVE LEADERSHIP ACROSS SOCIAL CARE



**Manny Gatt SSAf**  
is Managing Director Of  
Shared Service  
Architecture Ltd and  
lectures on both the  
Collaborative Leadership  
and Collaborative  
Transformation  
Postgraduate  
Certificates.

*Their challenge is how to balance working 'in' and 'on' the business, when 'in' the business challenges often top-trump longer-term work to transform the system.*

Over the last six months I have been teaching and facilitating sessions with various parts of the health and social care system across the East Midlands.

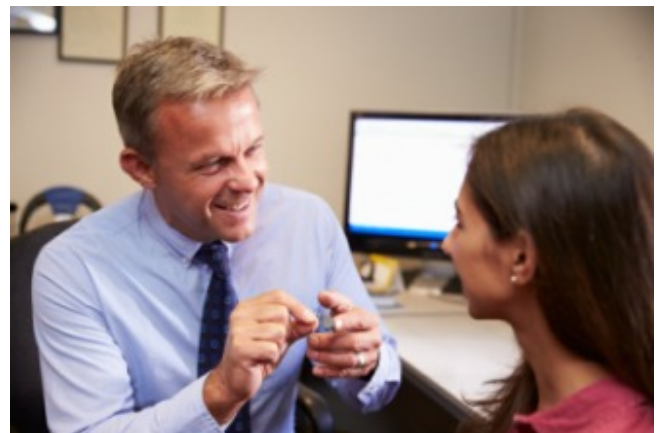
In my work, I have found that all the key stakeholders across the health and social care system recognise that they must work together in new ways to transform and integrate health and social care.

The challenge they face is how to change the system whilst simultaneously working full-on to meet today's pressing demands on the healthcare system. Their challenge is how to balance working 'in' and 'on' the business, when 'in' the business challenges often top-trump longer-term work to transform the system.

To unlock this logjam, leaders from across the system recognise the need for skilled collaborative working professionals, grown within their health and social care system. These will be the 'trusted individuals' to champion and support the NHS, local authorities, GPs and community service partners as they work together to deliver the service integration required.

In relation to this, I wanted to share with you some of the key support papers and materials that evidence the challenges for doctors and CCG senior managers when they enter into the collaboration space.

Many of the challenges will be familiar to SSAs from across the public sector. However, some are more specific to the structure of the health sector and require specific styles of support and tools.



## Ten lessons we can learn from...

In 2010, The King's Fund, The Nuffield Trust and Hempson's solicitors created a very helpful toolkit for working on the creation of confederations<sup>1</sup>.

The team worked under the guidance of a steering group from the Royal College of General Practitioners and an external reference group that included front line practitioners working within federations as well as other senior staff from across the NHS.

From an assessment of the evidence, ten key lessons were distilled that are still particularly pertinent to those embarking on the development of a primary care federation.

1. **The motivations for practices to federate vary**, and include: a response to a perceived threat in the external environment; a desire to gain economies of scale in (often specialised) service delivery; to share risk in healthcare purchasing or commissioning; ...through to undertaking clinical governance activities.

<sup>1</sup> Kings Fund et al (2010) *Toolkit to support the development of primary care federations*.



2. **Function affects form** – the size and legal entity will depend on the purpose for which the primary care organisation has been developed. For example, for running out of hours or other urgent care services, or a larger organisation with sophisticated risk sharing arrangements services.
3. **Independence from the statutory sector accords longevity.** A key question for practices thinking about a federation is whether they want to join together in an entity that protects their independence, or as some form of state/health system network.
4. **Involving doctors is relatively easy – it is harder to be more inclusive.** Most primary care organisations tend to be doctor initiated/led and, even where they seek to be more inclusive, they rarely seem to involve nurses, allied health professionals and others in a significant or strategic manner.
5. **Primary care organisations are good at planning and developing services within primary care and community settings** – those services that are closest to the concerns of GPs and practice staff. Practice based services, prescribing, and intermediate care are most commonly reported as objectives... There is much less evidence about groups' effectiveness in relation to commissioning secondary and specialised services.
6. **Primary care organisations are more likely to make substantive change where they have direct control of budgets** and where there are direct financial incentives for professionals.
7. **Clinical leadership and engagement are essential** to the development and success of primary care organisations, and require constant nurturing and attention.
8. **High quality management and infrastructure support is critical** to the success of primary care organisations, and its importance and scale are typically underestimated at the outset. It takes time to establish a fully functioning federated organisation, typically at least two years.
9. **Primary care organisations increase transaction costs within local health economies** – there is a cost to federating practices, providing management support, and engaging primary care professionals in activities beyond their practices. Such costs have to be weighed against anticipated and actual benefits...
10. **Major service transformation will require highly organised primary care as a bedrock.** Whilst policy in many countries calls for shifts of care from hospital to community settings, along with improved care for people with chronic illness and reductions in avoidable hospital admissions, there is little evidence of such service shifts happening in a significant manner within the NHS. Research points to the need for highly organised (and appropriately incentivised) primary care as a prerequisite for this.

#### What does the BMA have to say?

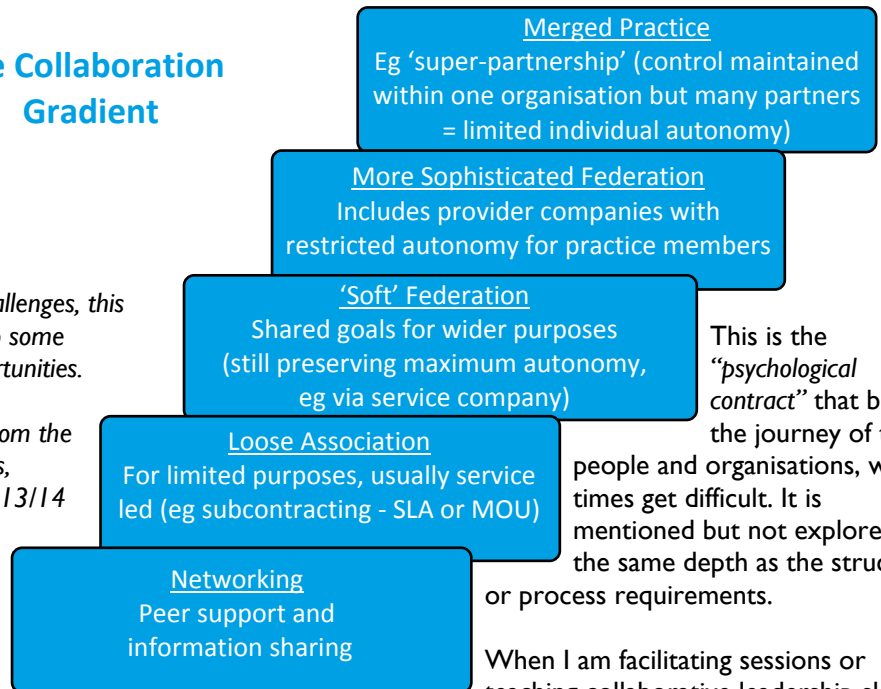
Building on the King's Fund toolkit, in October 2013 the BMA's General Practitioners Committee published a *Collaborative GP Alliances and Federations Guidance for GPs*<sup>1</sup>.

The BMA set out the context and challenges for collaborative working as...

*The Health and Social Care Act 2012, which came into effect on 1 April 2013, brought about the advent of clinical commissioning groups (CCGs) and new procurement and competitive tendering rules. Whilst presenting traditional General Practice with*

<sup>1</sup> BMA (2013) *Collaborative GP Alliances and Federations Guidance for GPs*.

## The Collaboration Gradient



*I highly recommend both the King's Fund and BMA reports. However, there is limited focus on the importance of the collaborative relationship at organisational and personal level.*

*considerable challenges, this also gives rise to some significant opportunities.*

*The demands from the UK governments, including the 2013/14 contract imposition in England, have not only increased the workload of*

*already over stretched practices but have also reduced investment in the GMS contract.*

*In England, many practices, already operating at the limit of their resources, will soon find themselves under additional pressure to adapt to equitable funding changes.*

The 19-page report unpacks, through helpful case studies, a range of collaborative models, which GP practices could adopt for different purposes:

- Simple alliances/formal and informal joint ventures
- Joint premises
- Partnership mergers
- GP co-operatives

It also provides suggestions on legal vehicles that these arrangements may fall under:

- Traditional GP partnership agreement
- Private companies limited by shares
- Community interest companies and social enterprises
- Charity or charitable incorporated organisation
- Limited liability partnerships (LLPs)
- Private companies limited by guarantee

I highly recommend both the King's Fund and BMA reports. However, there is limited focus on the importance of the collaborative relationship at organisational and personal level.

This is the "psychological contract" that binds the journey of the people and organisations, when times get difficult. It is mentioned but not explored in the same depth as the structural or process requirements.

When I am facilitating sessions or teaching collaborative leadership skills, a key message the students learn is that collaborative working is 75% about the relationships at both personal and organisational level, and 25% about the deal (structural or process).

This is brought out in detail in the November 2014 Primary Care Development Centre's Paper *Inter-Practice Collaboration*<sup>3</sup> to which I contributed. The paper talks about the Collaboration Gradient, focusing on the depths of relationship between the organisations...

*It is important to emphasize that there are many forms of collaboration, which do not involve federations or other formal structures and, while we see benefits in collaboration generally, we are not suggesting that one form is better than another, or that there is an ideal structure to which all should aspire. There is no "one-size-fits-all". There is in fact a continuum of collaboration which we have chosen to illustrate diagrammatically in what we call the collaboration gradient.*

Within this context, the PCDC working in collaboration with Beyond Consultants and Shared Service Architecture will pilot a new type of GP leadership development programme.

The pilot will bring together both the DEAL: the 'how to initiate' GP collaborative models of working, and the RELATIONSHIP aspects of trust building and collaborative working: 'how to be' a collaborative leader.



# HARNESSING COLLABORATIVE LEADERSHIP FOR YOUR ORGANISATION...

This new programme of three workshops is specifically designed to help cut costs, increase systems value and empower community solutions by sharpening the collaborative leadership skills within your organisation.

The programme will help your leadership to:

- Transform, and remove inefficiencies in, the organisation through improved internal collaboration and innovation
- work in partnership with other organisations to develop and deliver more efficient and effective system-wide value
- lead collaboratively to empower your community to participate in the co-creation and delivery of services

To discuss adopting the **Harnessing Collaborative Leadership** programme for your organisation, please contact Dominic Macdonald-Wallace at:  
**E:** [dominic.wallace@sharedservicearchitects.co.uk](mailto:dominic.wallace@sharedservicearchitects.co.uk)  
**T:** 0796 898 5544

## Your choice of 3 workshops...

Each of the three stand-alone (but related) sessions come with accompanying toolkits and support materials. Each addresses in turn the three perspectives of harnessing collaborative leadership:

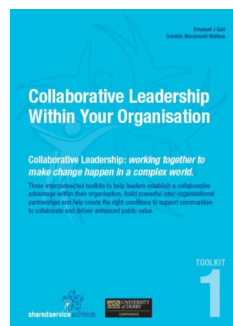
1. **Harnessing Collaborative Leadership Within Your Organisation:** *How can leaders remove inefficiency within their organisation, through better collaborative working between departments?*
2. **Harnessing Collaborative Leadership Between Organisations:** *How can leaders work together to secure improved, lower-cost, systems value through sharing and collaborating?*
3. **Harnessing Collaborative Leadership Across Communities:** *How can leaders engage, build and empower community-based service delivery and solutions through collaborative leadership?*

## What are the additional benefits?

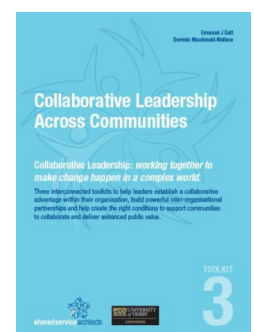
The programme has the flexibility of a short course, suited to meet the rapid development needs of organisations and partnerships, together with a qualification pathway to a **Post Graduate Certificate in Collaborative Leadership** for individuals seeking to enhance their career options.

In addition:

1. Your senior staff will have a grounding in how to apply collaborative leadership to cut costs and overcome wicked problems within your organisation, in partnerships and across communities.
2. They will be equipped with almost 100 highly practical tools, templates and techniques that they can use in collaborative leadership roles in any of the three settings.
3. They will have access to probably the largest online library of collaboration and shared service knowledge in the UK.
4. They will receive weekly email newsletters to update their understanding of collaborative leadership issues and track who is doing what across the public sector.



There are almost 100 tools, templates and techniques in the Collaborative Leadership Toolboxes...



...helping you lead collaboratively to make change happen in a complex world.

# RIGHT HERE - RIGHT NOW

## Mainstreaming co-production



**Colin Daysh SSA,**  
is Head of IT/IS at  
Belfast Metropolitan  
College

This report from Nesta, was published half a decade ago in 2010 so, on first glance, its title seems inaccurate. Yet the concepts are perhaps more relevant now than they were then.

Although revealing its age through references to the Big Society, its description of the challenges of getting co-production into the mainstream is thought provoking and practical when set against the background of austerity, welfare reform and a fractured society.

Co-production offers solutions that not only have the potential to deliver high quality, efficient services, but also work to create and bolster communities. A world of co-production public services seems like a nice world to be part of.

This truly is collaborative transformation – user centric, delivering what users actually need and want, measuring benefits delivered across functional areas – it is a concept that can really transform services and people's lives and the skills of the SSA and SS(PRAC) community can help to take it forward.

### The dysfunctional relationship between the state and the people...

The report describes the challenge and the factors exacerbating that challenge (eg. demographic changes, changing expectations and new demands).

However, just why co-production is key to meeting the challenge is better expressed in the description of the dysfunctional relationship between the state and the people who are supposed to benefit.

People are generally knowledgeable about what is best for them and if they are given some measure of control over what happens to them, they tend to do better.

To be truly effective, co-production needs to be the default model of public service delivery, “the standard way of getting things done”.



### Defining co-production is a challenge...

Definitions can be dry so the report gives us an understanding through examples, with four case studies as evidence of how different life could be.

In essence, co-production is “...where the people who are currently described as ‘providers’ and ‘users’ work together, pooling different kinds of knowledge and skill”.

Defining co-production is like defining a shared service or collaborative project – what should the service be like when this is all working?

Four main challenges are identified where further work is needed:

- commissioning co-production activity
- generating evidence of value
- taking successful co-production to scale
- developing professional skills.

The common theme is that moving co-production to the mainstream is neither simple nor easy.

The authors state, “...there will need to be profound changes in the way that people who work in public services – at all levels – understand their roles and carry them out”.

*In essence, co-production is “where the people who are currently described as ‘providers’ and ‘users’ work together, pooling different kinds of knowledge and skill”.*

*“...there will need to be profound changes in the way that people who work in public services – at all levels – understand their roles and carry them out”*

A similar approach as that used successfully for collaborative transformations including shared services.

#### **What does the report recommend you think about?**

The report’s recommendations fall under three themes:

- Changing the way services are managed and delivered.
- Changing the way services are commissioned.
- Opening up new opportunities.

The recommendations under each could easily be applied to our own work, just substitute “shared services” for “co-production” and it all seems very familiar.

For example:

- building key features into existing services,
- changing systems and structures,
- putting the right incentives in place,
- measuring what matters, and
- embedding the new system as a default model going forward.

Each of these has a direct read across to the successful introduction of collaborative transformation and so, although the report highlights the difficulties in getting co-production into the mainstream, the solutions that are offered can work; we have seen it with shared services.

You can download *Right Here Right Now* from <http://www.nesta.org.uk/publications/co-production-right-here-right-now>

#### **The people need to be different...**

However, the recommendations also highlight where co-production can be very different to shared services. Delivering co-production is not only about the mechanics of how services are delivered and the systems behind it; the people need to be different.

For example, the recommendations include “radical” changes for frontline staff in training and incentives along with new criteria for recruitment. It is these differences that really stand out in the recommendations.

Co-production is about structural change in public services and we know from our experience that such change is possible, if challenging; but it is also about fundamental changes in the delivery of services at the frontline and that is perhaps where the biggest challenges lie.

#### **The shared service cross-over...**

This report explains the benefits of co-production and outlines the challenges faced in moving it to the mainstream.

On first reading, the challenges can seem insurmountable, but looking at it again, you can see parallels with introducing shared services.

Co-production offers many benefits and solutions to the challenges of today: more efficient services, empowered citizens, and a true sense of community.

It will be difficult to achieve, but just because it is difficult and hard, doesn’t mean we shouldn’t try.

The SSA and SS(PRAC) community has a lot to offer in applying our experience of introducing and making a success of similarly radical changes.



# THE IMPORTANCE OF TRUST IN PUBLIC SECTOR COLLABORATIONS



**Terry Huggins, SSAf**  
is an Associate Director  
with SSA

*Trust is lower in the public sector than either the private sector or voluntary sector and the report describes it as a “sector in trouble”, suffering from a trust shortfall.*

When we have a choice, we collaborate with those we trust.

There are many well publicised local authority shared services which provide good examples of this. However, sometimes formal structures or circumstances require us to collaborate with those not of our choosing. In these cases, the success of the collaboration is determined by the trust between the parties.

A high level of trust within an organisation benefits its internal operation and influences the reputation it has with others. With trust being so important, it is of concern that the recent report of the Institute of Leadership and Management<sup>1</sup> puts trust in the public sector at such a low.

High performing local authorities tackle both the challenges of their localities and achieve financial sustainability and are those who operate collaboratively. The same is true for other public sector bodies. Collaboration might be with other authorities through sharing service delivery to make financial saving and improve standards.

Collaboration might be with other public sector organisations, tackling wicked issues over which none individually control all the levers of change, such as anti-social behaviour, obesity or joblessness. Through commissioning arrangements, collaboration might be with the private sector or voluntary sector.

Collaboration can be with communities on co-designing and co-delivering, leading to redesigned services.

Organisations which collaborate well in these ways externally, inevitably begin by collaborating well internally. Collaboration becomes part of their DNA. They have what has become widely recognised as “Collaborative Advantage<sup>2</sup>”.



## **Collaborative ventures comprise two elements; the deal and the relationship.**

Too often, attention focuses on the terms and operation of the deal, with insufficient attention given to building and sustaining the relationship.

In examining emerging collaborations that fail to reach completion, the reason is most often a failure in the relationship.

The relationship is important and, just as in personal relationships, it needs to be worked on if it is to grow and sustain.

My experience is that once building the relationship is discussed, “TRUST” is quickly identified as the most important component. Collaboration is important to achieving public value and trust is a determinant of the effectiveness of collaboration.

## **Are we are a ‘sector in trouble’?**

The Institute of Leadership and Management’s recent survey and research indicates a significant difference in trust levels between different sectors.

<sup>1</sup> ILM (2014) The Truth About Trust: Honesty & Integrity At Work

<sup>2</sup> Moss Kanter, R. (1994) Collaborative Advantage; The Art Of Alliances.

*The survey reveals a massive difference in trust levels across sectors, with the public sector (29% net high trust) falling significantly behind the private sector (45%) and voluntary sector (46%).*

Trust is lower in the public sector than either the private sector or voluntary sector and the report describes it as a “sector in trouble”, suffering from a trust shortfall.

Compared with other sectors and industries, Local Government has the lowest trust from its own employees within the organisation and externally is only trusted less than the media and bankers.

The survey reveals a massive difference in trust levels across sectors, with the public sector (29% net high trust) falling significantly behind the private sector (45%) and voluntary sector (46%).

Further, 12% of public sector managers say they trust either ‘very few’ or ‘no one’ in their organisation.

When asked how much they trusted their own organisation’s managers, local and central government had the lowest level of trust at 10%, compared with the average of 40% across all industries and sectors.

The research also indicated a link between internal trust and external trust, suggesting that industries and sectors with low trust internally, also suffer from low trust from its customers and stakeholders.

Whilst this is of concern, it must be noted that the ILM survey bundles central and local government together and there is some data to suggest that the picture in local government may not be quite so bleak with regards to the trust of their local council by residents.

What then can local government do to address this deficit in trust and what skills and competencies does it need to cultivate?

Covey says that trust is based upon character and competence<sup>1</sup>. Based upon the academic literature, the ILM identified six determinants of trust in their Index of Leadership Trust.

These are:

- **Ability** - the leader’s ability to do their job
- **Understanding** - displaying knowledge and understanding of their employee’s or reports’ roles and responsibilities
- **Fairness** - behaving fairly and showing concern for the welfare of their employees or reports
- **Openness** - being accessible and receptive to ideas and opinions
- **Integrity** - striving to be honest and fair in decision making
- **Consistency** - behaving in a reliable and predictable manner

The ILM 2014 survey didn’t use their index of leadership trust but instead sought to identify what managers considered to be the fundamental skills and qualities that leaders need in order to be trusted.

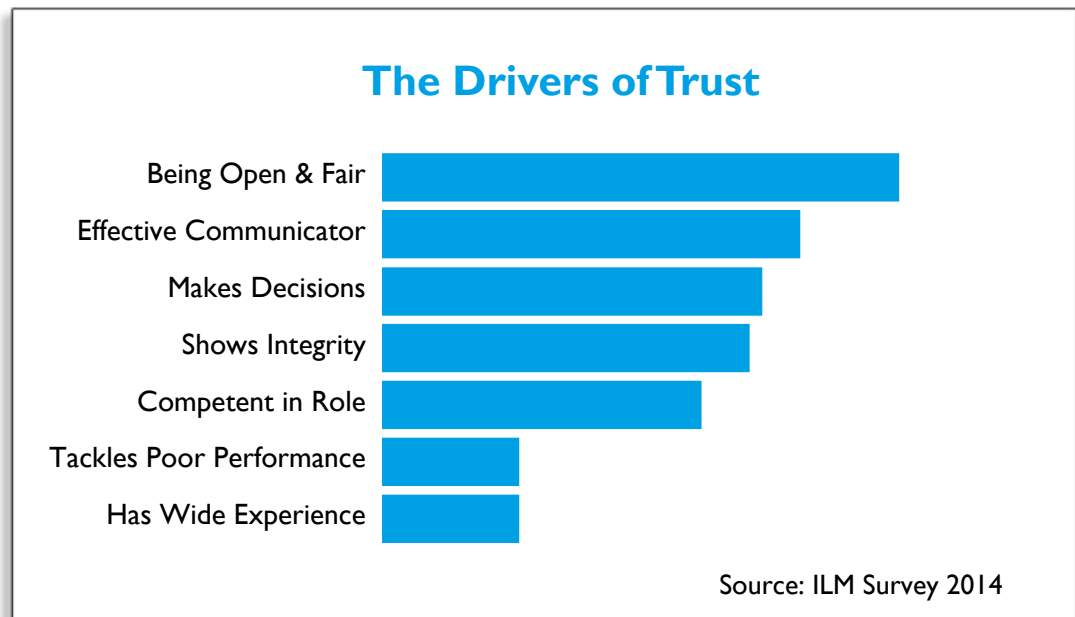
The five drivers of trust, shown above, were identified as the most important in determining whether or not a leader was trusted.

With less emphasis on individual behaviours, the LGA, SOLACE and LGComms published a report in 2013 entitled *Building Trust - An Action Plan*.

This report has a communications slant and builds upon earlier work to enhance the reputation of local government.

<sup>1</sup> Covey, SMR. (2006) *The Speed Of Trust: The one thing that changes everything*.

*They concluded that structural reforms such as elected Mayors and more referendums will not restore trust in their own right.*



It concludes that brand, leadership and strategy are the keys to building trust.

What I find most interesting is the list of benefits accruing from building trust:

1. Changes in the way services are delivered
2. Manage demand for services
3. Manage expectations of the people and organisations that you serve
4. Deliver behaviour change
5. Access capacity within the community to deliver services
6. Reduce unnecessary contact with the council
7. Increase engagement with the democratic process
8. Improve community cohesion and local places themselves
9. Improve access to and use of services

10. Boost the morale of staff and elected member

11. Improve the lives of residents

12. Better join up local public services

#### **Will more mayors and referenda restore trust?**

In 2010 the think tank DEMOS published the second of two pamphlets on trust in local government based upon their own research .

They concluded that structural reforms such as elected Mayors and more referendums will not restore trust in their own right.

Behavioural values and personal interactions are crucial to trust and local authorities need to put relationships at the centre of their activities.

Their research revealed three key drivers of trust:

- service quality,

*In future, successful public sector organisations will be led by those who can effectively collaborate with others.*

- the quality of personal interactions and
- the perception of fairness in the decision making procedure.

The recommendations were for local government to:

- move beyond satisfaction measures as a measure of effectiveness
- develop community capacity
- create space for individual staff to build trust
- prioritise community engagement in strategic decisions and understanding needs
- hold open days to meet middle management
- create citizen advocates
- promote the role of councillors

In future, successful public sector organisations will be led by those who can effectively collaborate with others.

Those seeking to build or rebuild their reputation for collaborative working should begin by improving their levels of trust.

The skills can be learnt and developed. Collaborative leadership by example, from the top, is key to encouraging the will to learn in others.

### **Rapid development that leads on to a qualification**

Since organisations and partnerships need people to develop these skills rapidly, the SSA Collaborative Leadership programme (see page 15) consists of three, intensive one-day workshops.

And, if you would like to take things further and gain formal recognition of your learning, you can elect to take the Postgraduate Certificate in Collaborative Leadership at University of Derby.

### **Step on step off**

You can handpick the workshops most relevant to you, or sign up for all three; it's entirely up to you.

If you are interested in gaining the postgraduate qualification, you can either enrol on this at the beginning, or decide to progress onto it later.

SSA and University of Derby have designed the programme to be as flexible and modular as possible.

# Tool: CLB8.02

## HANDLING CONFLICT IN COLLABORATIVE WORKING

This tool is taken from the SSA Collaborative Leadership Between Organisations Toolbox

...in a collaborative leadership setting, partnership conflict can arise within groups of people you have no employment control over. And, you may only meet with them once a month or even less, so are not aware of problems that are bubbling up.

Tool CLB8.02 helps you co-create with the partnership's leaders a policy on responding to partnership conflict issues that may arise.

When the word conflict is used in this context, it means differences that arise, that require a joint leadership decision to resolve. The conflict can vary from very minor issues, but leaders still need to rule (collaboratively) on them, through to major issues that may stop the collaboration project.

### Leading beyond your boundaries makes this even more complex

Conflict management inside your organisation can be quite tough, but as a leader you have influence with your staff, who will normally defer to your decision making because you have employment control over them.

In addition, you will be plugged into your management network and will be informed of issues that may present themselves and can be defused in the early stages.

However, in a collaborative leadership setting, partnership conflict can arise within groups of people you have no employment control over. And, you may only meet with them once a month or even less, so are not aware of problems that are bubbling up.

### Expect three kinds of conflict...

**Task Conflict:** this type of conflict refers to disagreements about the job or work to be performed collaboratively.

The conflict comes from the different opinions and viewpoints of the work/team participants as to how the work should be performed.

But, this can also be a symptom of unwillingness to participate in the collaboration activity, especially if the collaboration may result in the person, or staff, creating the conflict losing their jobs.

**Process Conflict:** refers to differences among team members when they disagree with how they should work together.

This often evolves from disturbance to the way things are done now and is fed by the problems of attempting to align differing work cultures.

Putting staff together who have differing, strong opinions on which processes or methods should be applied will lead to conflict. Cameron and Green write that, *'The job of a leader in a merger, is first, to ensure that the team will know things will not be the same any more. Second, he or she will need to ensure people understand what will change, what will stay the same, and when it will all happen. Third, the leader needs to provide the right environment for people to try out new ways of doing things'*.

**Relationship Conflict:** this type of conflict centres on who is to blame and who is right and who is wrong.

Relationship conflict pits one person against another person or group. Mistrust and great emotional tensions arise. This is the most difficult conflict to handle and can result in people being 'moved on' as the only way progress can be made.

### The leaders need a common policy

The clear message from ACAS<sup>2</sup> is that if the leadership do not put a conflict-handling strategy in place for staff, enforcing one afterwards is significantly more difficult.

So, start with how you will handle problems that arise between the leaders of the collaboration partners. How can any conflicts that arise be worked through together?

<sup>1</sup> Cameron, E. and Green, M. (2012) *Making Sense of Change Management*. 3rd Edition. London. Kogan Page

<sup>2</sup> ACAS (2009) *Managing Conflict At Work*. ACAS Publications



...before creating 'the conflict handling policy', you should spend time on this 30 minute exercise with the leadership. It could well be one of the most vital 30 minutes the leadership spend at the start of the collaboration.

Then, if the plan for your collaboration activity is that members of the leadership should assume responsibility for a workstream or project, you should co-create a common policy to handle the conflict-resolution issue before any of the workgroups are convened.

For example, 'Team members should approach (name) with any issues that arise that they cannot resolve among themselves. If that approach cannot resolve the issue, then (name) should take the issue to the leader of the partner concerned for a decision.'

A similar kind of policy could be cascaded downward, if leadership of the workstreams is delegated to senior management.

Examples of these kinds of resolution policies already exist in each partner's HR policies and you can either adopt, combine or create a new style depending on the circumstances.

### What could possibly go wrong?

However, before creating 'the conflict-handling policy', you should spend time on this 30 minute exercise with the leadership. It could well be one of the most vital 30 minutes the leadership spend at the start of the collaboration.

It will enable them to anticipate conflict issues that may happen, and put in place actions to reduce that risk.

The exercise can be very revealing about the cultures and issues that exist within your organisation and the other organisations of the partners.

It involves asking the leaders to anticipate 'what could possibly go wrong and create conflict' in the collaboration you are setting out on. They will know the past tactics of their colleagues and can bring them to this exercise.

It will apply the question to each of the three areas of task conflict, process conflict and relationship conflict. But it starts with handling conflict between the leaders.

You will need post-it notes, pens and a flip chart.

### How to use this tool:

Tool CLB8.02 helps you co-create with the partnership's leaders a policy on responding to partnership-conflict issues that may arise on your watch as a collaborative leader.

Start with co-creating a policy on handling conflict between the leaders...

**Step 1:** Ask each leader to write down on post-it notes (one suggestion per post-it note) what could potentially go wrong in the relationship between the leaders. They should randomly place their post-it notes on their group's flip-chart sheet. (Give them about up to five minutes)

**Step 2:** Then ask them to gather around the flip chart to discuss their post-it note suggestions and cluster them by common themes. (About five minutes).

**Step 3:** Next, ask them then to draw a two-column table on their flip-chart sheet, similar to the one shown on the opposite page. Ask them to write the two headings *Conflict Problem* and *How will we handle it?* at the top of their columns.

**Step 4:** In the *Conflict Problem* column write a list of the common themes<sup>1</sup> leaving the right-hand column blank.

**Step 5:** Finally, ask them to agree a policy on how to handle each *Conflict Problem* they have identified and to write the policy into the *How will we handle it?* column against each theme in their list.

The subsequent list of issues and antidotes can be used to anticipate and diffuse potential conflict issues that could arise during the project journey.

Repeat the exercise for *task conflict*, *process conflict*, and *relationship conflict*.

The overall policy should then be refined and published as part of the governance structure.

<sup>1</sup> If there are a very large number of themes, maybe you could ask them to list their top five or top ten depending on how much time you have.

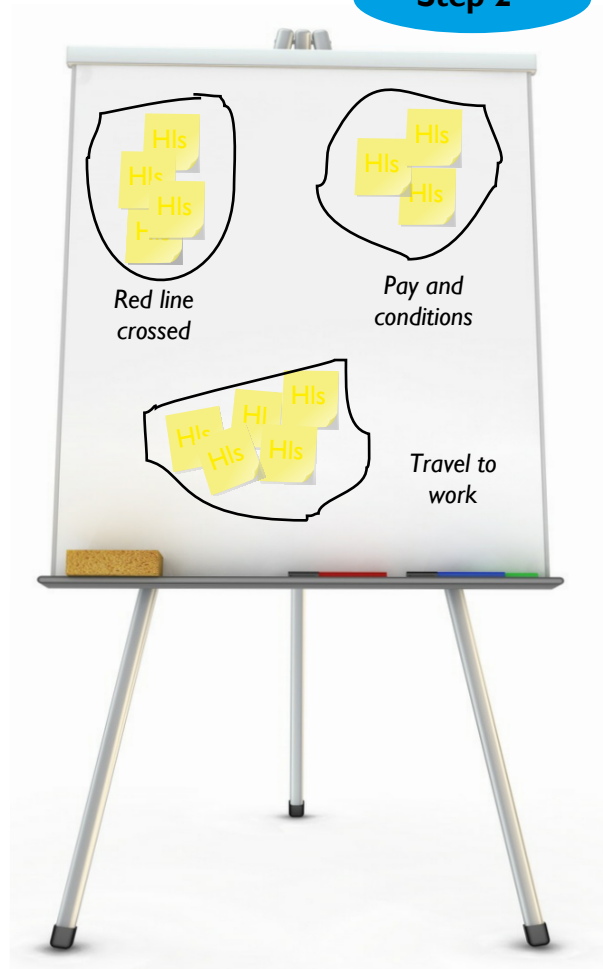
## Step 1



## Tool: CLB8.02

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## Step 2



## Steps 3, 4 &amp; 5

<b>Conflict Problems</b>	<b>How will we handle it?</b>
1. A partner's red line is being crossed	Convene a leadership meeting to work through the issues
2. Unaligned staff pay and conditions	Create a partnership job spec and align pay and conditions
3. Refuse to travel to new workplaces	Map where staff live and additional travel costs and look for ways to balance the staff travelling times

These examples are drawn from across the four areas of potential conflict:

- Leadership
- Task
- Process
- Relationship

# THE SHARED SERVICE ARCHITECT'S COLLABORATIVE TRANSFORMATION TOOLKITS ARE NOW ONLINE...

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The tools support the Postgraduate Certificate in Collaborative Transformation at Canterbury Christ University and the Postgraduate Certificate in Collaborative Leadership at University of Derby.

**Flexible, multi-purpose project tools, templates and techniques for accelerating:**

- **Combined Authorities Working**
- **Devolution Projects**
- **City Region Partnerships**
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- **Collaborative Transformations**
- **Alternative Ways Of Working In Partnership**
- **Shared Services**
- **Collaborative Working Within Organisations**

If you would like to make the Shared Service Architect's collaborative transformation tools, templates and techniques available to all of the departments across your organisation, and across your partnerships, they are now available as PDFs for unlimited download.

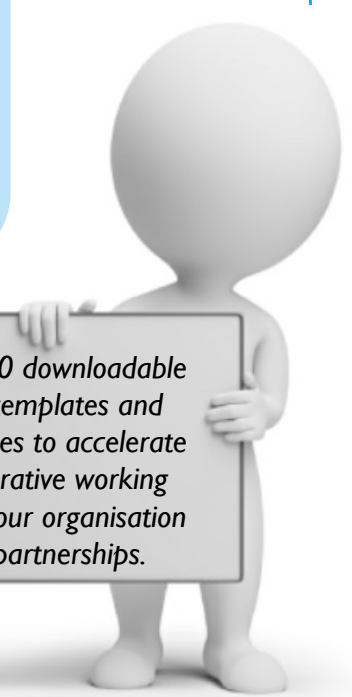
The annual license includes training seminars in how to gain the most from their application by your colleagues.

Visit [www.sharedservicearchitects.co.uk/SSA-Online-Tools](http://www.sharedservicearchitects.co.uk/SSA-Online-Tools) for full details.

Or email

[dominic.wallace@sharedservicearchitects.co.uk](mailto:dominic.wallace@sharedservicearchitects.co.uk)

to arrange a demonstration



*Over 200 downloadable tools, templates and techniques to accelerate collaborative working across your organisation and partnerships.*

# WHAT DO THE ONLINE TOOLS LOOK LIKE AND HOW ARE THEY STRUCTURED?

*Each tool is set out in its own six-page layout, and designed so that what you read in the morning, you can be applying that afternoon.*

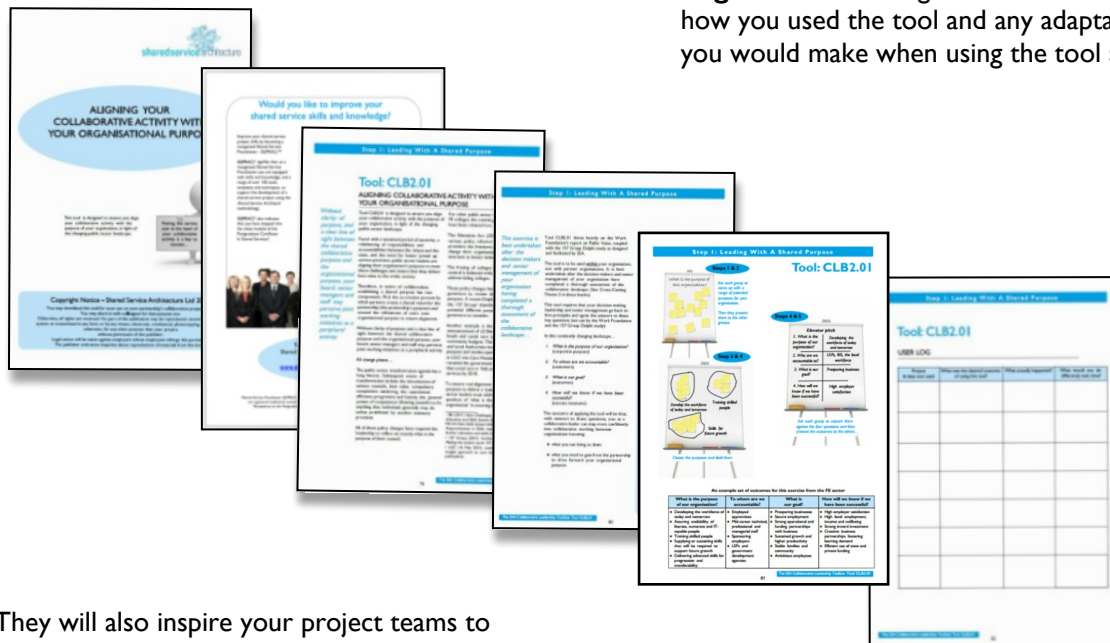
Each tool is set out in its own six-page layout, and designed so that what you read in the morning, you can be applying that afternoon.

The tools provide support for each of the six stages of the Collaborative Transformation Journey Map from *Collaborative Leadership* through to *Transform and Improve*.

**Pages one to four** explain the the tool, the situations you might consider deploying it in and the background, academic and practitioner underpinning. Page four also contains a step-by-step guide, in the blue column, to applying the template, tool or technique.

**Page five** provides an example layout of the tool so you can develop and adapt it for your specific purpose.

**Page six** is a user log to record when and how you used the tool and any adaptations you would make when using the tool again.



They will also inspire your project teams to create their own, tailored tools, templates and techniques for their projects.

Equipped with these tools, this is their opportunity to be enterprising and innovative and accelerate the success of your collaborative projects they are working on.

Visit [www.sharedservicearchitects.co.uk/SSA-Online-Tools](http://www.sharedservicearchitects.co.uk/SSA-Online-Tools) for full details.

Or email  
[dominic.wallace@sharedservicearchitects.co.uk](mailto:dominic.wallace@sharedservicearchitects.co.uk)  
 to arrange a demonstration

# Tool: BC4.06

## PLEASE CAN I POP ROUND YOUR HOUSE AND SEE HOW TIDY YOU ARE?

*This is an example of an online tool from the **Drafting A Collaborative Business Case** section.*

*If an organisation enters a long term partnership with a contractor, due diligence is a matter of course. You would check a contractor's environmental policy, financial standing, reputation, etc. The same applies to collaborative working partners.*

Tool BC4.06 provides a pro-active methodology for conducting due diligence between the partners.

Too often due diligence is left to the last moment. BC4.06 recommends that you move it to an early stage of the partner discussion and declare the diligence in the business case.

The technique is for one partner to take the initiative and evidence that they are a good partner to work with. This will encourage all partners to do the same, or be seen to be hiding something.

### From dating each other to “I do”!

Developing a business case is only part of the collaborative process. The first step in agreeing to explore joint working and see where it leads can be exciting. Its a bit like going out on a first few dates with someone.

As time progresses the partners may decide to move from basic discussion and dating, to say “I do” and sign the paperwork.

However, signing the paperwork is a major move and the ‘divorce’ can be very costly. So each partner will need to be checked out (due diligence) to ensure they are suitable to collaborate with.

Collaborative transformation and shared services are no different to other relationships an organisation has with suppliers. If an organisation enters a relationship with a supplier, due diligence is a matter of course. You would check a contractor's environmental policy, financial standing, reputation, etc. The same applies to collaborative working partners.

### I'll show you mine...

To avoid the embarrassment of asking if a team can go into a partner and carry out a due diligence check, why not create something similar to a “Self-Certification Report” for one of the partners.

So maybe at an early stage one partner could gather the evidence that they are ‘...a good partner to do business with’.

Taking the relationship analogy one step further, there could be internal questions about can we become a better partner than we are now? It might be OK to leave pizza boxes in the living room as a singleton, but you might need to change your habits when the collaborative marriage begins.

### “They have their little habits, but I’m sure they’ll change after we are married!”

More fundamentally, it might be OK in-house, to make regular changes to resources, budgets and staffing when you have no partners. You can get away with poorer performance, repeated error, or sweep bits under the carpet.

But in a collaboration, imperfections will be revealed through due diligence checks, so partners may want to prepare for that.

BC4.06 suggests that due diligence is as much about self awareness and being a good organisation to do business with, as it is about checking out ‘that lot down the road’.

It's as much about improving partnership skills, as it is about having the confidence to join up with another organisation. Seen this way it is about self awareness and developing deeper relationships and therefore is a mutual process.

### Tender terms of endearment...

A way to approach this is to create a report by partners that confirms, ‘why you should partner with me’.

Ask the partners, “What due diligence information would you expect from each other in relation to the shared service being considered?” Each organisation can then respond with a self-assessment report and provision of appropriate evidence.



*The report should have an accuracy declaration signed by a Chief Exec, Chair of Board or similarly senior person.*

### **Where are the bodies hidden?**

Example areas for due diligence are:

#### **1. Financial standing:**

- Can a partner evidence that they have the money to invest in the collaboration?
- Can they provide recent inspection evidence about the quality of their financial management?

#### **2. Track record**

- Can they show that they have the skills, capacity and resource to deliver the project on time and to budget?
- Do they have examples from other projects and partnerships they have embarked on recently?

#### **3. Partnership skills**

- Do existing partners find them good to do business with? (eg major contractors, other shared service partners, LSP members etc)?
- Do their leadership have the willingness to compromise to get better results for all?

#### **4. Compatibility**

- Are their HR policies similar enough to make sharing staff easy? (eg travel, leave, pay and reward, termination)?
- Are their procurement policies closely aligned to make this an easy win? (eg thresholds, exceptions)?
- Are their ICT systems compatible or adaptable for change?

#### **5. Policies**

- Are policies on social value, data protection, equal opportunities, sustainability, whistle blowing, quality, etc in place and adequate?

#### **6. Stability**

- Are there known events in the near future that could fundamentally change commitment levels? (Eg elections, succession issues, contingencies on other major projects, upcoming court cases on unequal pay claims).

You will be able to identify more in relation to the specific shared service you are developing the business case for.

The key point here is that each partner should offer a due diligence report on their own organisation. Those that decline, may have something to hide.

### **How to use this tool:**

#### **Have a look at the example “self-certification” on the next page.**

Tool BC4.06 provides a pro-active methodology for conducting due diligence between the partners early in the journey. Too often due diligence is left to the last moment.

BC4.06 encourages partners to take the initiative, and evidence that they are a good partner to work with at the early stage of a collaboration or shared service discussion.

**Step 1:** Assemble a workgroup of the finance directors, heads of the audit and key senior managers from across the partners.

**Step 2:** As a group, create a checklist of due diligence test questions that partners would want to ask of each other.

**Step 3:** Each partner then goes back to their organisation to answer the list of diligence questions and provide a report, with any evidence to support claims. The report should have an accuracy declaration signed by a chief exec, chair of board or similarly senior person.

**Step 4:** Each organisation is then offered the opportunity to review the reports from the other partners and ask for clarification on any of the answers.

**Step 5:** When all partners are satisfied with each others' due diligence statements they can be formally accepted by the group.

## Tool: BC4.06

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### **Report of Due Diligence From The Board Of South Southly College**

For the benefit of developing the “One Southly” partnership we confirm the following:

1. South Southly College has set aside £157,000 to contribute as our share of the first step fund for the partnership. This will be held on account for payment on the 15th of September...
2. The South Southly College HR policy is available for inspection along with other HR documents that may be requested by partners, subject to confidentiality agreement.
3. South Southly's ICT systems review report is available for inspection by partners to ensure that there is compatibility between systems and processes.
4. The college is not currently subject to any legal actions that may impact on the shared service partnership.
5. We evidence that we have the capacity and skills to develop this project through the history of the Southly Gateway Partnership and Local Strategic Partnership. Partners may be approached for discussion on our role in the success of those projects.
6. Etc...

Signed: Alan Calderdale Date: \_\_\_\_\_

Alan Callerdale, Chair of South Southly College Board

# EMERGENCY SERVICES COLLABORATION

## THE CURRENT PICTURE



**John Beckerleg SSA**  
is Director of Supporting  
Services at the Chief Fire  
Officers' Association

The emergency services are not exempt from funding pressures and the need to transform to ensure they continue to provide the best possible service to the public.

Whilst the political parties may not agree on the organisational and governance models, there is broad consensus around the benefits of better joint working and that is likely to be taken further post the 2015 elections.

However, until recently, the evidence of what was happening on the ground was incomplete and there was only limited chance for organisations to learn from others' experience.

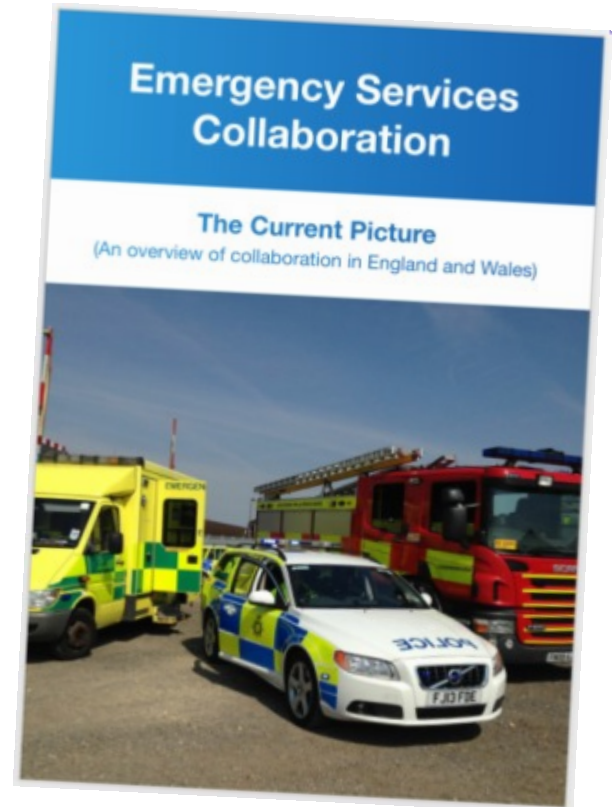
During the summer of 2014, central government asked ambulance trusts, fire and rescue authorities and police forces to provide examples of collaborative transformation initiatives.

The resulting wide range of examples is highlighted in this overview entitled **"Emergency Services Collaboration – The Current Picture"** and is well worth a read.

The Emergency Services Collaboration working group, which published the overview, is made up of partners from the three emergency services and the Local Government Association.

The working group highlights the difficulty of reconciling increasing demand in many areas with the current and expected funding restrictions and concludes that *"collaboration provides opportunities to truly innovate and save money"*.

If you are about to embark on a collaborative initiative, then read the section on *'What makes a collaboration successful?'* The characteristics described mirror the learning from the Shared Service Architect's programmes.



Collaborative transformation can take many forms and the report identifies first the work being done at a national level – such as improving interoperability between emergency services at major incidents – and the funding being made available to help support transformation. Perhaps the section that is missing is examples of collaboration between Whitehall departments.

But it is at a local level that the examples really demonstrate exciting developments in working together.

### The A-Z of blue light collaboration

In an A-Z of schemes across England and Wales, there are descriptions of 38 collaboration projects.

*The Emergency Services Collaboration working group, which published the overview, is made up of partners from the three emergency services and the Local Government Association.*

*The overview provides a really concrete way in which people can gain inspiration, learn from others and avoid re-inventing the wheel.*

The range of initiatives is quite amazing; no two projects are the same. For example there are case studies on:

- combined support services,
- sharing senior officers,
- sharing premises,
- joint operational teams,
- locating management teams together,
- improvements to lifesaving response,
- data sharing,
- training together,
- aligning governance models,
- common contact management

.....and other collaborative activities.

The overview provides a really concrete way in which people can gain inspiration, learn from others and avoid re-inventing the wheel. Most, if not all, of the examples are capable of being transferred to other geographical areas if the will and leadership is there.

And the final bonus? The overview sets out not just to report on the various examples but also provide a practical way to share good practise and innovation. So, the working group has established a peer-to-peer network.

This network will help you to learn about the its role, the overview of projects and, really helpfully, a way to contact project leaders. A shared community has been created to share information and learning.

To follow this up, email [info@999collaboration.org.uk](mailto:info@999collaboration.org.uk)

#### **Emergency Service Collaboration: The Current Picture**

can be downloaded from the CFOA website at [www.cfoa.org.uk](http://www.cfoa.org.uk)

Click on the 'Guest' button to gain access

### **Example Case Studies In The Report**

#### **Improving Life Saving Response**

Retained firefighters in East Cleveland co-respond to medical emergencies in partnership with North East Ambulance Services

#### **Joint training of Police and Fire**

A shared training facility for Cumbria Constabulary and the Cumbria Fire and Rescue Service is located at the force's headquarters and has brought down training costs for both organizations and facilitates the joint training of police officers and firefighters.

#### **Community Safety Task Force**

In January 2012 the Margate Task Force was formed to tackle a range of community safety and social health challenges in two of the most deprived wards in the UK. Led by a fire service group manager, 14 agencies (including fire, police and health) have completed detailed joint risk and vulnerability assessments and delivered directed interventions to tackle on-going problems.

#### **Co-location of blue light services**

The Civil Contingencies and Resilience units of Greater Manchester Police (GMP), ten local authorities and representatives of the Fire Service, Ambulance Service and the NHS Resilience team are co-located at GMP headquarters. This places key expert advisers together and adjacent to the primary Command and Control facility, and promotes better and more integrated approaches to collaboration

# STAFFORDSHIRE & WEST MIDLANDS FIRE CONTROL

## A case study in collaborative working



**Becci Bryant SSA**  
is Deputy Chief Executive  
/Executive Director at  
Staffordshire Fire &  
Rescue

The Shared Fire Control Project was formed to provide a collaborative approach to fire control services across Staffordshire and the West Midlands Fire Services.

Our aim was to combine the provision of fire control services, sharing one common call handling and mobilising system within a single location along with the provision of a single secondary control providing local resilience.

We wanted the opportunity for enhanced resilience and more effective and efficient ways of working. The new shared facility “Staffordshire & West Midlands Fire Control” (S&WMFC) commenced operations in March 2014 and delivered immediate savings of £1.5m across the two organisations.

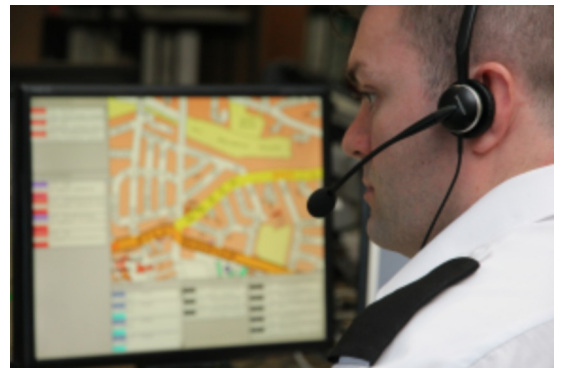
The collaboration also provided the opportunity for the services to look across the full range of their activities with a view to further efficiencies. Our experience of this collaborative working project has produced some key learning points as follows:

### **Agree clear governance arrangements before you start and on an ongoing basis**

The governance structures for the project were defined and agreed at the start of the process. This provided a clear and organised route for decision-making.

We made sure that Authority members, officers and representative bodies were included at decision-making levels, which resulted in issues being raised and dealt with quickly, with the ability to adapt and evolve during the process.

We now have a Service Level Agreement for the operation of the joint facility, with an operations board that meets once a month and a shared governance board that meets quarterly.



### **Ensure you resource appropriately**

We have found that having a dedicated project team and recruiting an independent, experienced project manager were invaluable to the achievement of our project milestones.

The project manager’s role gave us a realistic understanding of the amount and scope of work and the co-ordination of the work required to reach “go live”.

Identifying and assigning resources amongst our existing control staff was a difficulty as both services had shortfalls in their control establishments. Solutions and attractors for staff involvement had to be creative, relevant and cost effective.

The right technical and legal advice needed to be in place at the start of the project, to be drawn upon as needed, for example expertise around the impact of TUPE legislation.

### **Ensure appropriate support for your staff**

A key challenge was to ensure that appropriate support was given to staff facing change and to involve the representative bodies in discussions about this support.

For example, we provided career support to staff affected by the merger in order to provide staff with as many employment options as possible. Representative bodies were involved in this as an automatic part of the decision-making.

*A key challenge was to ensure that appropriate support was given to staff facing change and to involve the representative bodies in discussions about this support.*



*What was underestimated was the range and amount of low level change that staff would have to contend with and how this would impact on business as usual.*

The support from the representative bodies assisted in staff feeling comfortable in using this service. The outcomes of this process meant that staff, who were not happy to transfer to the shared control, were supported towards redeploying within the service or choosing an alternative career option.

### **Consider the impact of differences in culture**

Significant lessons have been learned from the project work around the impact of the differences in organisational culture in the two services. Whilst the differences did not impact on the project milestones, specifically the go live date in March 2014, it is recognized that more focus on aligning these may have been beneficial.

For staff working in the new shared control, it is recognised that the differences in terminology, procedures, custom and practice have created a barrier. During the project phases, decisions were made to address these areas with agreement on the terminology that would be used.

What was underestimated was the range and amount of low level change that staff would have to contend with and how this would impact on business as usual.

### **Focus on the people and build relationships**

Because of staffing numbers in both services during the project phases, staff were not able to interact and form relationships across the two control rooms.

The staff delivering the project work met at regular intervals; however, staff working in the control rooms did not. It is recognised that this would have been beneficial to the individuals, and the Fire Control team as a whole, and so may have provided an improvement to the overall service delivery.

More focus on the people may have reduced the time needed for the new teams to normalize.

### **Collaborative Leadership**

We have found it important for the leaders of both organisations to provide joint messages. This included the less popular or palatable messages such as staff reductions as well as the popular ones like savings to the public purse.

An important factor in the success of this project was clear understanding and shared vision between the leaders of the two organisations and a consistent approach to communications.

### **Lessons Learned**

If we were to do the same exercise again, we would probably be asking these eight questions very early on in the journey.

#### **Key Questions**

1. Have you an effective governance structure for the project?
2. How will your governance work on an ongoing basis?
3. Have you included the relevant parties in your decision-making, ie trade unions, authority members and officers?
4. Have you adequate resources in project management and legal expertise?
5. What support have you put in place for staff affected by change?
6. What are the differences in culture between the organisations?
7. Have you built in time and actions to build personal relationships?
8. How do you ensure that leaders from both organisations give the same messages at the same time?

## KEEP YOUR EYE ON THE NEEDS OF COMBINED AUTHORITIES

*Combined authorities will have control of a range of budgets and they will need the skills of SSAs and SS(PRAC)s to help them negotiate the regional people, power and politics issues.*

The trade by the Greater Manchester Combined Authority with George Osborne - accepting a Mayor in exchange for control of the health budget - is critical for all those involved in collaborative working.

It is the signal that, whilst shared service working is still relevant, the major game is becoming large scale collaborative transformation, of which shared service working will be a sub-set.

In the 2014 PWC survey of local authorities, they conclude the introduction with the comments: 'Overall, this year's survey highlights a growing appreciation within local government that radical transformation across the public sector in a place is needed. So far, local authorities have done a good job in transforming their internal processes and operating models. As we look to 2015 and beyond, this approach will no longer be sufficient. Councils need to look outwards to redefine their role and purpose and lead transformation not just for their own organisations, but across whole places<sup>1</sup>.'

The bribe of more devolution, offered to the Scots to win the independence referendum, has opened up similar demands by the large cities in England. As a result, the combined authorities will have control of a range of budgets and they will need the skills of SSAs and SS(PRAC)s to help them negotiate the regional people, power and politics landscape.

The starting point for this will be the creation of strong trust and shared vision between the leadership.

Simply put, if the leadership relationships are poor, the deal will be low quality and ineffective.

<sup>1</sup> PWC (2014) *The Local State We're In*. PWC Publications

### Back to basics...what is a combined authority?

The House of Commons Library Standard Note on combined authorities<sup>2</sup> is helpful in setting the context and background:

*Combined authorities may be set up by two or more local authorities. The combined authority must include all local authorities in its area: it cannot include, for instance, part of a county council area. They may take on transport and economic development functions. They have a power of general competence.*

*Combined authorities are a type of authority which may be set up, by the Secretary of State, at the request of local authorities in a specified area. Their purpose is to undertake joint functions through a public body with its own legal personality.*

*They were introduced in sections 103-113 of the Local Democracy, Economic Development and Construction Act 2009. The power to set them up extends to England only. Local authorities must trigger a review process in advance of setting a combined authority up, but the power actually to create a combined authority lies with the Secretary of State, via statutory instrument.*

*The Secretary of State must consult the authorities that would be covered by the combined authority, and must be satisfied that the establishment of a combined authority will contribute to economic development and transport policy:*

*(1) The Secretary of State may make an order establishing a combined authority for an area only if, having regard to a scheme prepared and published under section 109, the Secretary of State considers that to do so is likely to improve—*

*(a) the exercise of statutory functions relating to transport in the area,*

<sup>2</sup> Sandford J, House of Commons Library (2015) *Combined Authorities Standard Note SN/IPC/06649*.

We interviewed over 50 senior leaders across LEPs, councils, a Mayor, FE providers, HE, business and community groups.

- (b) the effectiveness and efficiency of transport in the area,
- (c) the exercise of statutory functions relating to economic development and regeneration in the area, and
- (d) economic conditions in the area.

There is also a requirement that: (4) In making the order, the Secretary of State must have regard to the need—

- (a) to reflect the identities and interests of local communities, and
- (b) to secure effective and convenient local government.

Authorities may also be removed from the combined authority, or the combined authority may be abolished, again by statutory instrument.

The Standard Note also has maps of the current combined authority deals that were on the table in January 2015. These are:

- Greater Manchester Combined Authority
- North East Combined Authority
- West Yorkshire and Sheffield Combined Authorities
- Liverpool City Combined Authority

#### Anyone else want a combined authority?

In February, the LGC<sup>1</sup> magazine published a potential 40 clusters of councils stepping forward, in for example:

- Derbyshire
- Nottinghamshire
- Lancashire
- Cambridgeshire
- Tees Valley
- Birmingham/Black Country
- North West London
- Greater Bristol
- PUSH (Southampton, Portsmouth, Isle of Wight and surrounds)
- South Wales (Cardiff and surrounding authorities)
- Oxfordshire, Buckinghamshire and Northamptonshire

#### What support will combined authorities need to accelerate their development and delivery?

SSA has been involved in a research project, in February/March 2015 into the impact of combined authorities on further education and skills for economic growth.

We interviewed over 50 senior leaders across LEPs, combined authority councils, a Mayor, FE providers, HE and community groups.

What interested us were the key elements that needed to be in place for the combined authority to be effective.

It was clear that the localism agenda is a multi-billion pound, multi-partner, mixed organisational culture, collaborative transformation experiment and requires two things:

1. Leaders who understand collaborative leadership, exhibit collaborative leadership behaviours and are willing to cede power and responsibility for the good of their locality and the combined authority
2. Project leaders who are skilled in collaborative transformation and shared service working and can apply the SSA toolkits to accelerate the success of these programmes

In interviews, we heard about impressive amounts of money being received, and large scale infrastructure projects (eg. HS2) being developed.

It would have been more reassuring to hear talk about initially focusing on building strong trust and relationships between the leadership and senior managers in the partnering organisations, rather than on the money and infrastructure project deals.

For combined authorities, if there is a lack of strong relationship between the partnering organisations, then there will be no deal.

<sup>1</sup> LGC 26/02/15

# THE COMPLICATIONS OF MORE THAN FOUR PARTNERS...



David Williams SS(PRAC) is SEWIC Telecare Project Manager

Published articles in editions of this magazine – and the findings regarding success factors for collaboration, included within the SSA Toolkits – have highlighted that there appears to be an ‘optimum number’ of partner organisations for initiating successful collaborative working.

That number is a maximum of four. The more partners, that there are beyond four, then the complexity increases almost exponentially!

From my perspective it would be helpful if such knowledge is more widely disseminated, speaking from the experience of seeking to take forward partnership and collaboration (and they are different as we know) across a wide range of partners. This has certainly been the case with the SEWIC Assistive Technology and Accommodation with Care project.

SEWIC stands for South East Wales Improvement Collaborative, and the SEWIC Board is made up of the nine Directors of Social Services covering Blaenau Gwent, Cardiff, Caerphilly, Merthyr, Monmouthshire, Newport, Rhondda Cynon Taff, Torfaen and Vale of Glamorgan. This ‘Making the Connections’ SEWIC project is part funded by the European Social Fund through the Welsh Government.

In 2010 they identified a number of areas for potential collaboration across social care including:

- An Adult Brokerage Hub
- High Cost Placements (learning disability and mental health)
- Adult placements (now Shared Lives)
- Foster care placements
- Assistive technology/Telecare
- Extra Care Housing

## What were the aims?

A project proposal was prepared and submitted to the Welsh Government. The project was successful in gaining funding through the European Social Fund (ESF) and Welsh Local Government Association (WLGA)



*The SEWIC project is part funded through the European Social Fund through the Welsh Government*

for a two year project on the two latter work streams of Assistive Technology and Extra Care Housing.

The high level project objectives were to:

- Promote empowerment; independence and wellbeing and improve the quality of life for service users and patients
- Prevent or reduce levels of need and service dependency such as:
- Reduce the number of avoidable admissions to care homes
- Reduce the number of avoidable admissions and readmissions to hospital
- Facilitate timely hospital discharges
- Reduce the need for more acute; chronic and more expensive forms of health and social care interventions
- Support and reduce pressure on informal carers
- Deliver economies of scale; the potential for reduced front end costs and back end cost prevention and savings
- Greater commissioning impact with the market delivered by a larger regionalised approach

By the time the proposals were accepted and grant allocation given, the number of partners had increased from nine to eleven. Making links with Local Health Boards added another three over time as well.

Two members of staff were employed in July 2011, on secondment from local authorities in

*By the time the proposals were accepted and grant allocation given, the number of partners had increased from nine to eleven. Making links with Local Health Boards added another three over time as well.*

*The project high level objectives had already been set and the project managers inherited these, with no clarity as to how they had been derived.*

the SEWIC region, as respective project managers for Assistive Technology and Extra Care Housing.

The project high level objectives had already been set and the project managers inherited these, with no clarity as to how they had been derived.

For the Assistive Technology component of the project there was an expectation to undertake a cost benefit analysis and outline business case for merging of local authority call monitoring centres.

#### **Looking back what observations would we make?**

An external consultant had been employed by the SEWIC Board and had co-ordinated identification of collaboration areas. It was valuable to have a neutral outsider in this role and to be a link to the sponsoring Chief Executive Group.

It was clear that there was a rationale for integration of monitoring centres – and previous work had been done on this, for example across five authorities. However several authorities had already moved to externalise their services through tender.

In addition there were very different stakeholder perspectives – four authorities didn't have a monitoring centre having chosen to outsource (with Housing Stock Transfer) or tender. The five existing centres were to an extent in competition, happy to expand and take on other local authority business, but not looking to merge.

Only one of the five Directors of Social Services (SEWIC Board) had monitoring centres directly under their control and so internal cross departmental engagement was needed within authorities, adding extra burden to the decision making relationships.

*The Smarthouse Big Button Phones link to monitoring centres*



It was clear that such conversations had not taken place in all cases, and understandably those other departments (including Housing, Corporate Services, Customer Services, and ICT) had their own opinions as to possible mergers.

The overall cost benefit analysis showed a regional saving opportunity of around £2.4 million but would mean job loss/redeployment in 'losing' authorities, as there were clear winners and losers in a single centre approach. As a result, the SEWIC Board were reluctant to take forward any decision.

The project had also highlighted, that a wide range of departments with each partnering authorities had to be engaged in both decision making, and the levels of variation in costs and charges. As such there was frequent 'refer back' on reports and papers. Having a Lead Director from each partner was therefore very valuable in pressing for some level of decision.

It was agreed that the information on the cost benefit analysis would be helpful for each authority to make its own decision, with a principle of individual self-determination taken forward.

This led to two authorities taking forward individual tender arrangements to reduce costs with a change of provider – but as a result this moved their work out of the SEWIC region.



*Start with a realistic number of partners - sharing objectives and outcomes and add others only as the new service becomes stable.*

Also, during the project, there was an SEWIC agreed re-focus from partnership working in service delivery to 'softer' collaboration.

This included a cross authority Reference Group, sharing of practice, collective engagement with suppliers, development of case studies, raising service profile, development of a level of regional identity, and shared information/presentation to independent sector on assistive technology.

This also had to be agreed with the relevant team in Welsh Government and the WLGA. That led on to wider all Wales collaboration and engagement, working with:

- the Care Council for Wales (who were taking forward work on knowledge and skills sets for electronic Assistive Technology);
- the Social Services Improvement Agency (SSIA – including set up of a SEWIC area on their website for information exchange and best practice);
- other regional collaboratives in Wales; and with Wales Government.

In addition the project was extended – within the initial funding envelope – to run to December 2014.

It aims to leave a legacy of ongoing linkage at a regional level as well as migration of collaborative approaches at a national level, with a Wales Government and SSIA supported All Wales Assistive Technology Learning Improvement Network (LIN).



### **So what would we do differently next time?**

If we were to repeat a similar project our experience indicates that:

1. Start with a realistic number of partners - sharing objectives and outcomes and only add others as the new service becomes stable.
2. Project leads need to be involved in setting the objectives – so they stay real.
3. Getting full sign up is vital. We learned that partners only tend to become fully involved if they are putting in their own money. That was not the case in this project, where SEWIC had 100% external funding.
4. Map out the interdependencies of departments within the partner organisations. Which departments need to be engaged at an early stage in the project too?
5. Stay agile and be ready to re-focus – and look to achieve added value in different ways
6. Above all be flexible – things always change from what you might expect

# MID-KENT IMPROVEMENT PARTNERSHIP

## Redesigning Customer Contact

**Andy Cole, SSA**  
is Head of Mid Kent  
ICT Services

**Dave Lindsay, SSA**  
is Chief Information  
Officer of Mid Kent  
ICT Services

Local government has been experiencing the effects of central government austerity measures for the past five years.

Three Kent authorities: Maidstone, Swale and Tunbridge Wells Borough Councils, which have had their individual budgets cut by around 35%, formed the Mid-Kent Improvement Partnership to make savings and improve service delivery.

Each council has achieved savings through a variety of means, including ambitious asset disposal programmes, increasing income from key services, and investigating opportunities to become more commercial.

They are regenerating their high streets and communities, and have plans to share more services together.

With central government likely to ask for further efficiencies into the next parliament, MKIP knew it could not stand still, despite the councils' individual and collective successes. It recognised that further change and innovation would be needed to meet the future funding challenge.

As a result MKIP submitted a bid to the Transformation Challenge Award fund and won £569,200 to redesign customer contact across the councils.

By:

- implementing digital technologies
- reviewing processes to make as many transactions as possible online
- sharing data to improve decision making
- and applying techniques such as Mindspace to positively influence behaviour and manage demand

MKIP plans to significantly reduce costs and improve outcomes for residents.



The three authorities will share the transformation funding to deliver the following targets:

- increase the number of digital services available to reduce email and face-to-face contact by 70 percent, and telephone contact by 50 percent over ten years.

This will enable the authorities to incrementally redirect resources over this time period to those with the highest needs, who require face-to-face or telephone contact.

In addition, the aim is to increase website satisfaction to 80 percent "good".

Satisfaction levels will be monitored and new online services will be as good as before;

- reduce the cost to serve by streamlining processes and procedures, and using techniques such as Mindspace to positively influence behaviour and manage and shape demand;
- develop customer insight and business intelligence capability to monitor, manage and shape service trends and demand.

*This will enable the authorities to incrementally redirect resources over this time period to those with the highest needs, who require face-to-face or telephone contact.*

*The approach will be to engage service suppliers and clients in the change process, with the aim of revolutionising both communications and service delivery to customers.*

- As capability in this area matures, MKIP will work with other public service partners in the region to help shape and manage services at a regional level and improve inter-linked outcomes for residents; and
- provide a blueprint for partnership working within the region, and nationally, to cascade the learning and benefits to other organisations.

Starting in 2015, the way the MKIP councils interact with customers will be transformed.

Residents will be encouraged along the journey with an assurance of security and the ability to control their own data.

The councils will work with local charities and organisations to improve digital access and

make sure that people without digital access are not excluded. MKIP will apply a range of behaviour change techniques, including MINDSPACE which is endorsed by the Institute for Government and the Cabinet Office, to encourage uptake of the new digital channels.

By implementing the MINDSPACE process, the MKIP partners aim to influence behaviour through public policy.

The approach will be to engage service suppliers and clients in the change process, with the aim of revolutionising both communications and service delivery to customers.

Engaging with service users in a radical and collaborative way will help manage and shape service demand and expectations in the future.

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# PRUDENT HEALTHCARE IN NHS WALES SHARED SERVICES



**Richard Rout SS(PRAC)**  
is Divisional Manager of  
the Efficiency Programme  
at Halton Borough Council

This report will be of interest to SSAs and SS(PRAC)s, not only for the general learning it conveys from the health sector, but also to those of us operating across the wider spectrum of public service collaborative transformation.

Driven by Public Health Wales and the 1000 Lives Improvement Service, it provides useful insight on two levels.

Firstly, a focus on a collaborative workshop methodology used to ascertain where issues lie, and critically to explore the basis of a range of potential solutions and improvements.

Secondly, the issues highlighted as requiring intervention resonate with a whole range of other public service provision (Local Authorities, Civil Service, Emergency Services, and VCS).

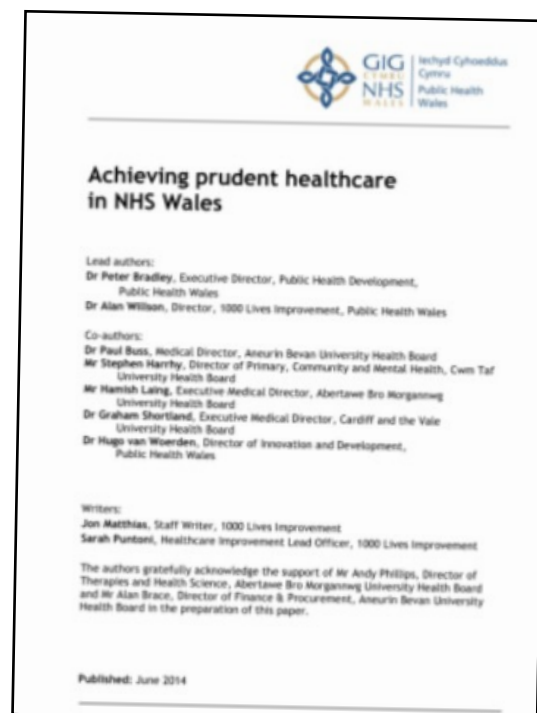
Elements of the analysis and the exploration of improvement options appear adaptable to the SSA and Practitioner's remit.

The reader is taken on a journey through various stages of analysis and dialogue between leaders, managers, clinicians and service recipients.

The unfolding thought processes are reflected, with signposts for you to critique, consider, or adapt to your own business discipline.

The core narrative is usefully augmented with evidence, expert views, enabling parallels to be drawn with other public sector disciplines.

The title misleads slightly as the cost reduction imperative is not the overarching drive; ensuring that the people of Wales receive the best possible care within available resources is.



**Prudent healthcare is expressed as the achievement of three objectives:**

- do no harm (10% of interventions are associated with some form of harm)
- carry out the minimum appropriate intervention (20% of work done has no effect on outcomes)
- promote equity between professionals and patients (patients do not understand the language of the system)

The reasons uncovered for imprudent healthcare are multi-dimensional, but point chiefly to:

- demand in the system being driven by capacity and not absolute need,
- a focus on processes and procedures in themselves rather than the outcomes they deliver,

- the use of language within the system that patients cannot understand, and situations where care is systemised not person centred.

Reasons for these mismatches are highlighted within the report and provide useful pointers, particularly around the triangulation of purpose and communication between those who hold the resources, and those who deliver the care.

Appreciation of cost at all levels is a priority consideration. The effects of the mismatches are manifested in the 'seven wastes'.

NHS Wales is currently working to reduce or eliminate wasted activities in emergency care; that is, those tasks which add no value to a patient's care.

In lean terms these wasted activities are characterised by:

- **Transport** - moving the patient and their information about,
- **Inventory** - managing stacks of materials or notes, or waiting lists or queues of patients waiting for services,
- **Motion** - staff moving around, often 'hunting and gathering' – looking for information, medicines, equipment,
- **Waiting** - patients, staff, machines waiting for something to happen,
- **Over-processing** - performing tasks that are not required, eg unnecessary tests,

- **Over-producing** - doing too much, eg the history and examination being repeated 3 times by (a) junior doctors in A&E, (b) in an assessment unit and (c) on the main ward after admission,

- **Defects** - tasks where the output is defective in that the downstream customer cannot implement the request, eg incorrectly filled in request forms, or incorrect prescriptions.

This ineffective deployment of resources and capacity, deficient management information, and poor patient outcomes providing the scope for collaborative transformation within and across elements of the healthcare system in Wales is significant.

The adoption of lean working principles is identified as a key improvement priority and, if achieved in a collaborative way, patient flow and outcomes would likely improve to a significant degree.

The report is clear that change is necessary and is being sought, but what that change looks like is not apparently preconceived.

The collaborative approach to diagnosing the core issues and the shared responsibility for bringing forward the solutions can be synergised with the challenges and successes of our work as SSAs and Practitioners.

The opportunities for knowledge transfer make this programme worthy of further investigation, today and in the future.

You can download a copy of the report from the [SSA Online Library](#) or by clicking the title below, or searching on the web for [Achieving Prudent Healthcare in NHS Wales](#)



# ARE YOU BEING SERVED?

## Surrey County Council Shared Service Centre Wins Three Shared Service Awards



Four members of the Surrey Shared Services Centre team are SSAs and hold the Postgraduate Certificate in Shared Services; three are SS(PRAC)s.

The word 'council' is not often synonymous with customer service.

Whether fairly or unfairly, the public sector has a bit of a poor reputation when it comes to putting the needs of the customer first.

Surrey County Council, like many others, is faced with decreasing budgets, increased requirements to make efficiencies and growing customer expectations.

In 2005, it established its own Shared Service Centre to cope with this complex and demanding environment.

Here was an opportunity to think differently: to create a public sector service that behaved with integrity and fostered a culture of continuous improvement, affecting the way people not only worked, but how they felt about their work.

Throughout the process of establishing and developing the Shared Service Centre, the driver behind this change was a focus on customer service.

### How we did it: The customer experience approach...

The overall aim was to provide a high quality service whilst maximising value for money. The senior management team realised that customer focus was critical.

To create this focus, a customer experience and strategy team was brought in to address the issue of low customer satisfaction, and to build capability, capacity and reputation.

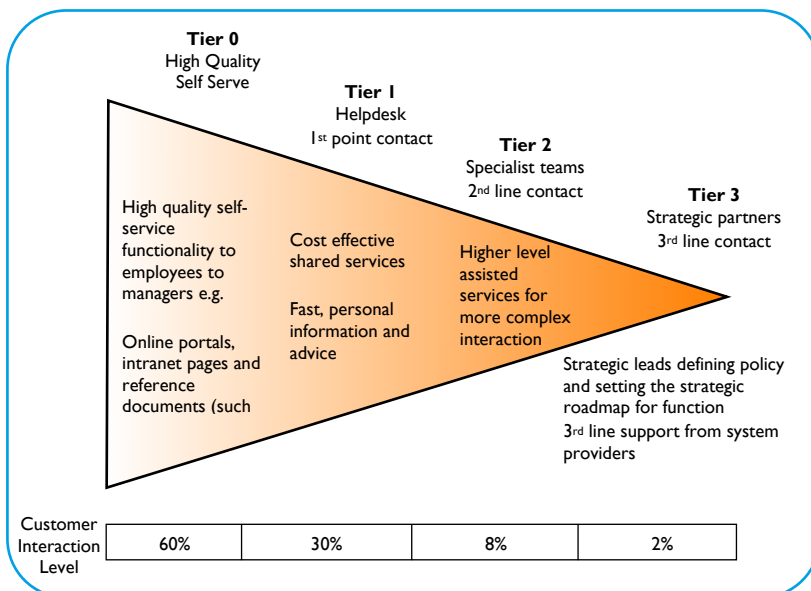
Their activities focused on the following:

- Developing an in-depth understanding of our customers by consulting them and using the feedback we received to redesign our services;
- Creating a customer-centric culture, in which teams were taught to listen to their customers and put them at the heart of everything that they did;
- Designing and implementing effective processes to enable us to measure our performance and strive for excellence.

The Ulrich model was adapted to help us understand customer enquiries and identify the main areas that required improvement. This channelled initial enquiries to our web pages and self-service function, reducing the demands on our helpdesk. These web pages cover policy and self-serve forms as well as outlining all our processes.

The helpdesk is the first point of contact and receives over 115,000 calls a year with a first point fix rate of 87%, minimising the number of calls being passed on to the second line teams.

The contact process for our customers is now so streamlined that a large proportion of queries are resolved at tiers 0 and 1 as shown in the diagram at the top of this page.



The helpdesk is the first point of contact and receives over 115,000 calls a year with a first point fix rate of 87%, minimising the number of calls being passed on to the second line teams.

In addition to this, our customer focus helped us win three awards in 2014 for customer service achievements... including *Best Shared Service Centre in Europe...*

### Our achievements

Since the Shared Service Centre was established, we have seen a decrease in costs, and an increase in activities and satisfaction.

### A customer-focused approach has seen multiple benefits

You can see in the graph on the right that, since 2005, we have driven down costs, whilst increasing activities and customer satisfaction.

Putting the customer at the heart of our service delivery has meant that we were able to achieve the following results since 2005:

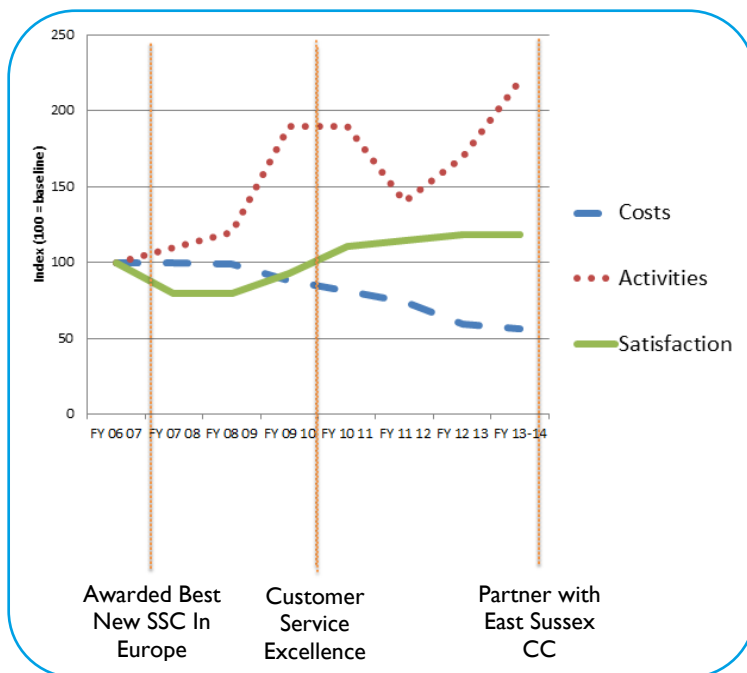
- 50% decreased cost to serve
- increased volume (up to 200%)
- 30% customer satisfaction increase

In addition to this, our customer focus has helped us win three awards this year for customer service achievements:

- Best Shared Service Centre in Europe 2014 – Shared Service Outsourcing Network
- Customer Service Excellence – with a 100% pass rate and two areas of merit
- Giving to the Community category winner – Peer awards

### Support from the SSA programme...

The knowledge we gained from sending staff on the Shared Service Practitioner's programme and a number through the Postgraduate Certificate in Shared Services at Canterbury Christ Church University has contributed to our success.



The key message is that putting customers first has helped build a successful shared service centre and we are proud of what it has achieved to date.

The excitement doesn't stop there. In April 2013 we developed a partnership with East Sussex County Council to merge transactional and corporate support services to share resources, best practices and further strive for those savings.

The success of this programme has given us the confidence to extend this partnership even further and we are currently working on combining the business service functions across both organisations.

Customer service is no longer simply a 'nice thing to do', it is fundamental to running a successful, sustainable service. This trend is set to continue and certainly will never reverse.

## COMMUNICATING YOUR COLLABORATIVE JOURNEY...



**Tim Smith SS(PRAC)** is Director of Blue Heron Communications and was Communications Lead for the oneSource collaboration between two London councils.

*There needs to be proper time allocated for communications on your meeting agendas.*

Few people would argue how important effective communications are to successfully establishing a new collaborative service. This is reflected in the large number of communications ideas and techniques appearing throughout the SSA toolkits.

For a significant shared services programme, there is a strong case for following a communications journey which runs alongside the overall SSA Collaboration Journey Map (see the final page of this article).

Over the last 12 months, I have led the communications support for the development of the oneSource shared service between London's Havering Council (Conservative minority led) and Newham Council (Labour Mayor). In this article are the steps I would recommend you consider as you develop your communications on a collaborative working journey.

### Putting Communications On The Map

At oneSource, we were bringing together 22 services with budgets of £58million and 1,300 people – a major project by any organisation's standards – so there was an early recognition that communications needed to be well planned and executed.

Good communications begin with preparing yourself for the journey ahead. For example:

- Do you have the resources to plan and manage communications for your project?
- Does your Shared Service Architect have the capacity and skills to do this?
- Are there resources available from your existing comms services or will you need some external (possibly part-time) support?

There needs to be proper time allocated for communications on your meeting agendas.

You also need to take advice on whether there are any big comms issues around that you need to be aware of. For instance, is the local media likely to be hostile and are there any vociferous pressure groups or individuals who oppose your plans?

Whilst the potential partners are busy understanding and developing the opportunities to collaborate, you need to take the time to put all the building blocks for successful communications in place. This includes producing your communications strategy, writing your key messages and deciding which channels to use.

I wrote a detailed communications strategy for oneSource, with clear objectives, success criteria and action plans well before we got to the point of writing the business case.

This meant that there were no surprises over the coming months and it was easy to monitor progress and risks.

I also produced a strong narrative which was used as the basis of our communications messages and ensured that these were consistent across the two councils – focusing on the questions of “Why are we doing this?” and “What does it mean for me?”

At this point, I ensured that we sent out strong leadership messages to staff and other stakeholders.

The news that the two councils were looking at sharing services was already ‘out there’ so it was important to reinforce that with positive messages, to quash rumours and disinformation.

*There was a programme of communications activities including our first staff roadshows, stakeholder briefings and meetings and a media release and photocall, with clear 'lines to take' ready for any media questions.*

### Communication is a team effort...

This is also the time to start building great working relationships with the communications people in the organisations that are planning to collaborate. They will already manage a range of existing communications channels and can be a real help in getting the collaborative transformation or shared service message across.

There's also a clear role for your communications resource in the shared vision stage. They can help write the vision in language that will excite and engage people, bring the stories that you developed at your workshops to life and ensure that the vision document itself has high impact and is professionally presented.

Havering and Newham used the vision document to launch the potential shared service partnership on the waiting world.

There was a programme of communications activities including our first staff roadshows, stakeholder briefings and meetings and a media release and photocall, with clear 'lines to take', ready for any media questions.

### How to use communication to gain consensus and buy-in...

We followed a similar approach at the next stage of the route map, establishing consensus and buy-in for the business case.

I made sure that we had a comprehensive package of communications in place, including further staff events at both councils, detailed 'Q and As' on the intranet, and stakeholder briefings.

When your journey reaches the 'Innovation and Design' stage, this is also the time to start looking at your future communications.

I worked on developing the name and brand for the new shared service, which was important to us as we wanted to establish it as something new and different for the two councils.

I also developed the implementation communications plan that would take us right through to 'Go Live' and set up the specific communication channels that the new service would use, including a brand new intranet and regular e-bulletins.

When the new joint service was ready to go and had reached the 'Transformation' and 'Operate and Improve' stages, my role (once we had launched the new service) was to establish the business as usual communications channels and ways of working. This was to make sure we celebrated our successes and used our communications tools to keep people focused on the overall vision.

### Consistency equals success...

Throughout the collaboration journey, it's important to have consistent messages running through all your communications. Repeat them regularly and ensure your audience can receive communications and messages through a range of channels (informal as well as formal).

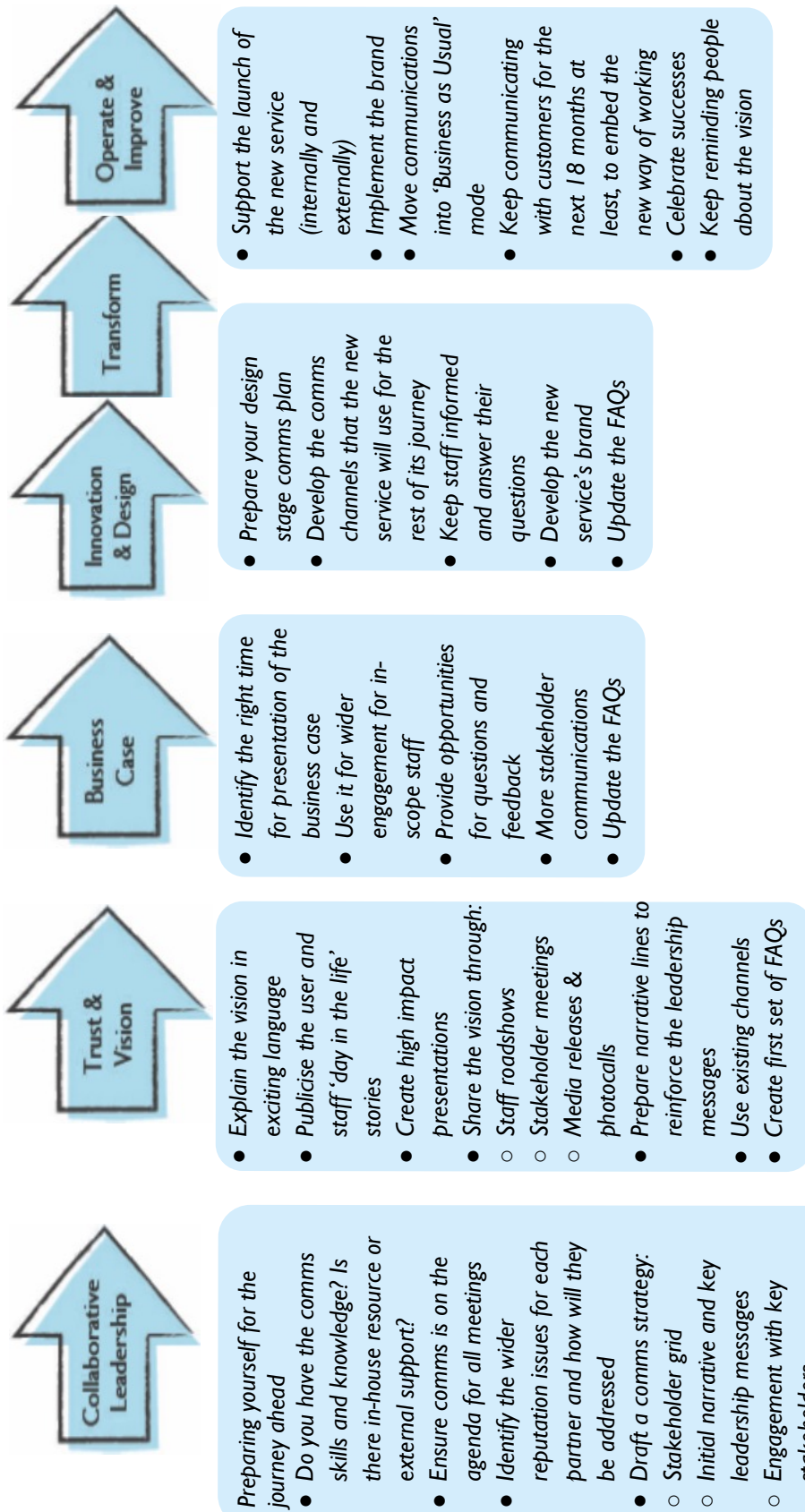
I also found that testing staff awareness and understanding and holding regular update meetings with the communications people in the two councils helped us keep communications activities on track as we developed oneSource after the launch.

### Developing a communications' checklist

On the the following page, I have matched a number of key communication steps and actions to the SSA collaborative journey map. I hope that it will help you in your journey. Also feel free to contact me if you have questions about the stages in the journey.

Tim Smith can be contacted at [office@blueheroncommunications.co.uk](mailto:office@blueheroncommunications.co.uk)

## The Shared Service Architect's Collaborative Working Journey Map



**A check list for your communications during the collaborative working journey**



# MEASURING THE BENEFITS OF COLLABORATIVE WORKING



**Jeanette Jones SSA**  
is Engineering Projects  
Officer & CWIC  
Programme Officer at  
Ceredigion County Council

The Central Wales Infrastructure Collaboration is a partnership between Powys and Ceredigion County Councils. We currently have a shared Engineering Design Service, and a single Streetworks team which co-ordinates works on the highway for the region.

At an early stage of the collaborative project, it was decided that identifying the benefits early on would aid decision-making, and, provided effective monitoring was in place, would contribute to evaluating success.

When we first started to think about measuring and recording the benefits of our shared service activities, we had limited ideas about how to approach it and I spent many a fruitless hour trawling the internet looking for clues. Eventually, I came across some relevant and useful items, and posts on the KnowledgeHub Project and Programme Management Community of Practice that pointed me in the right direction.

In this article, I have consolidated and adapted some of the learning to help others who may be wondering 'where on earth to start?'

## Starting at the beginning... What is a Benefit?

A benefit is "a measureable improvement resulting from the changes and outcomes introduced by the programme". It "must be perceived as an advantage by one or more stakeholders"<sup>1</sup>. Those changes and outcomes perceived as negative by one or more stakeholders are known as dis-benefits.

## Outputs, Outcomes and Benefits?

- Outputs are **activities/tasks completed** as part of a project
- Outcomes are **what has happened** as a result of an output
- Benefits are **measurable improvements** which have occurred as a result of an outcome

<sup>1</sup> BIS (2010) *Guidelines for Managing Programmes, Understanding programmes and Programme Management*

Using an example of the purchase and implementation of a shared bridge management system, which was acquired for our two partner councils, we can identify the outputs, outcomes and anticipated benefits as follows:

### The **Outputs** were:

- joint procurement
- joint licensing
- shared training

### The **Outcomes** were:

- standardised data
- facilitates joint working on bridge inspections
- commonality of approach
- reduced duplication of duties
- shared purchase cost
- shared licensing cost
- up to date inventory
- comparability of data allows benchmarking
- feeds into maintenance programmes allowing a more targeted approach
- improved management information

### The **Benefits** were:

- saving in staff time – procurement
- saving in staff time – bridge inspections
- saving in staff time – administration of database
- saving in staff time – administration of abnormal loads movements
- saving on cost of purchase
- saving on cost of licence fee
- better utilization of funds due to targeted maintenance programmes
- lifespan of assets improved due to targeted maintenance programmes
- improved highway infrastructure for public use.

We developed a benefits management process that would help us on all projects the partnership will develop. The process is set out on the next page to inspire your work.

*Linking benefits to project or change programme objectives clearly demonstrates the value of the project to stakeholders. It helps answer the questions 'Why are we doing this?' and 'Why are we still doing this?'.*

## The Benefits Management Process – step-by-step

### 1. Establish and agree a Benefits Management Strategy for your collaborative programme

At an early stage in your collaboration, it is important to establish and agree a benefits management strategy. It will contribute strongly to the development of trust and transparency of desires, between the partners.

A Benefits Management Strategy document will set out the intended approach to identifying, recording, measuring and monitoring expected benefits for the partners.

It will also indicate where the desired benefits are not identical for each partner (eg. one may desire benefits of cash savings, another resilience of service).

### 2. Draw up a Benefit Profile for each benefit and dis-benefit

Benefit Profiles need to record:

- attributes
- dependencies
- target values
- actual values
- measurement method
- review dates
- benefit owners

### 3. Create a Benefits Map

The map should illustrate:

- How benefits relate to, and depend upon, each other
- What project outputs and business changes are required in order to achieve the benefits

- How project outputs lead to achievement of strategic objectives

### 4. Produce a Benefits Realisation Plan

- Schedule the benefit measurement activities
- Schedule benefit Reviews
- Track realisation of benefits across the programme.

### 5. Undertake periodic Benefit Reviews

- Establish extent to which benefits have been realised to date
- Set targets for the future.

Linking benefits to project or change programme objectives, clearly demonstrates the value of the project to stakeholders.

It helps answer the questions 'Why are we doing this?' and 'Why are we still doing this?'.

### Measurements of benefits is Business As Usual

Business Change Managers must ensure that processes for tracking the realisation of benefits are embedded into business operations; the measurement of benefits must become 'business as usual'.

The importance of establishing baseline measurements at an early stage cannot be overestimated.

A lot of changes occur gradually and, when we come to measure benefits, we can be left unclear about what we should be measuring against, or when we should be measuring from!

# VAT CHANGES SNEAK UNDER THE BUDGET RADAR

*With the expected wider take-up on shared services, the government wishes to ensure that these bodies are not at a VAT disadvantage when they enter into such arrangements... Because of competition issues, this will also include situations where they procure an eligible service directly from a private sector provider.'*

Whilst we were all concerned with the impact of the 2015 budget on our pay packet, pension and general wellbeing, George Osborne quietly slipped in a major reform in shared service working and VAT Cost Sharing Exemption Groups.

From 1st April 2015, non-departmental public bodies and privately owned service providers will be eligible for VAT refunds on shared service working within the public sector.

## What is a VAT Cost Sharing Exemption Group?

VAT Cost Sharing Exemption Groups appeared as shared service vehicles following the 2012 Finance Bill.

HMRC refers to them as CSG (Cost Sharing Groups) and just to remind you, they are made up of non-vatable and vatable public sector organisations who come together to develop shared service activities.

The sectors that probably most interest us are:

- Housing
- Further Education
- Higher Education
- Health
- Charities
- Voluntary Groups
- Some Social Enterprises

HMRC makes it clear that a key factor for CSGs is that the services they provide to their members must be 'directly necessary' for their exempt and/or non-business activities. If they are not, the exemption does not apply and the supplies are subject to normal VAT rules.

This means that if a Cost Sharing Group qualify to be exempt, then members of the group that normally cannot reclaim VAT can do so.

However up until 1st April 2015 this only applied to public sector bodies.

Until then, if a VAT registered private sector organisation joined as part of the mix in a group, they would still have to charge VAT and the other public sector partners would not be able to reclaim it.

This change was pre-announced at the end of 2014 when HMRC stated that: *'There has been no provision to refund VAT to non-departmental public bodies sharing services with their parent department or between themselves... With the expected wider take-up on shared services, the government wishes to ensure that these bodies are not at a VAT disadvantage when they enter into such arrangements... Because of competition issues, this will also include situations where they procure an eligible service directly from a private sector provider.'*<sup>1</sup>

A number of industry commentaries suggest that government departments are expecting to save £13 billion as a result of these changes.

## Further government outsourcing is also anticipated as a result

Writing in a SourcingFocus.Com article<sup>2</sup>, Audrey Fearing, a partner at Ernst & Young who is involved in government and public sector tax, writes that: *'this opens the way for public sector bodies to explore innovative ways for reducing cost of delivery, by sharing back office functions, or indeed outsourcing third parties who can drive greater economies of scale.'*

In the same article, Kerry Hallard, CEO of the National Outsourcing Association added that, *'The introduction of VAT refunds for suppliers will enable many more public departments to take advantage of the cost savings and service improvements that outsourcing can provide. As a result, we expect this change to bring significant growth to the outsourcing industry.'*

<sup>1</sup> HMRC & HM Treasury, (Dec 2014) Overview of Legislation In Draft

<sup>2</sup> SourcingFocus.Com, 19/03/2015

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