

Building a Shared Service Toolkit

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A toolkit designed to support staff embarking on a shared service arrangement by bringing together existing resources and points of contact to help every step of the way.

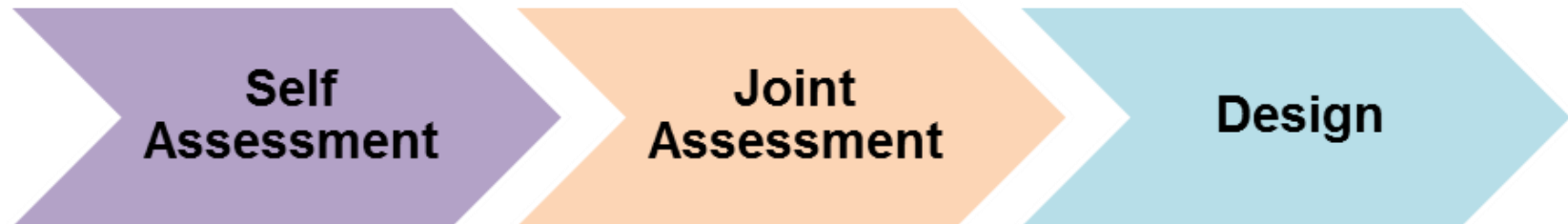


Introduction

Deciding to embark on a shared service arrangement is an exciting prospect, but it may feel daunting. This quick reference guide is designed to make sure you have considered all the essentials, used the tools already at your disposal, and been signposted to the best people to speak to at each stage.

Shared services can be defined as collaboration between public sector bodies to deliver services or to provide facilities.

This document uses a three step model to help you plan your journey from single to shared service.



**Self
Assessment**

**Joint
Assessment**

Design

Step 1:

You have started to think about becoming a shared service and you want to assess whether it is feasible.

Step 2:

You have identified potential partners to share services with and you want to assess whether your aims are compatible.

Step 3:

You are committed to becoming a shared service and ready to develop the business case for the change.

Self Assessment

Joint Assessment

Design

If you answer YES to the questions below, it might be time to consider a shared service...



Are leaders committed to becoming a shared service?

Do you have the right relationships with the right people?



Are you good enough at what you do to make an attractive offer to others?



Key tools:

Target Operating Models (TOMs) are used in Merton to plan services for the next five years. The 'Organisation Layer' will help you consider alternative delivery models.

Find out more [here](#).

10 Top Tips for Managers

You can access a more detailed version of this document with explanations of each tip [here](#).

- 1) Establish vision and trust
- 2) Build a collaborative advantage
- 3) Build your in-house capacity to share
- 4) Get lean before you share
- 5) Be clear about what you don't want to share
- 6) Be innovative
- 7) Be bold but realistic
- 8) Pick the right partner (or partners)
- 9) Learn from others
- 10) Be agile

Don't forget to hold early discussions to ensure relevant Councillors (Portfolio Members) are briefed and in touch with their counterparts in other boroughs

Meet the LBM experts...

Believe it or not, Merton Council has been sharing services since 2009! This means we have a pool of experts who can discuss their experiences, help you avoid any pitfalls, and listen to your ideas.



Why not get in touch (and stay in touch!) with those that have done it all before?

South London Legal Partnership
Paul Evans, Fiona Thomsen, & Paul Phelan
South London Waste Partnership / Phase C
Kathryn Wittams-Smith & Charles Baker
Regulatory Services
Paul Foster & John Hill



Further reading to help you think about the people side of change:

- Linda Holbeche's 'Reaping the Benefits of Mergers and Acquisitions'.
- Sue Cartwright & Cary Cooper, 'HR Know-how in Mergers and Acquisitions' published by CIPD.

Self
Assessment

Joint
Assessment

Design



Key tools:

Merton Approach to Projects (MAP) methodology has a Project Plan template that can be used to draft the roadmap for your change.

Find out more [here](#).

Lessons Learned

Shared arrangements are complex and will bring together two or more different ways of working.
Seek early advice on...

- 1) Ensure all partners have **clear expectations** about what they all want prior to implementation
- 2) Joint scope – be clear about **which parts of the service you want (and do not) want to share**. Remember you can always expand the service later!
- 3) Joint **financial arrangements** - be clear about joint budgets, income and overheads.
- 4) Joint procurement strategies – **how will the shared service procure** its technology and kit?
- 5) Joint facilities – **is co-location essential** and will it incur extra costs (relocation & travel)?
- 6) Consulting with and managing the expectations of your **elected members**.

Meet the LBM experts...



Your internal support network will be crucial at all stages but during the joint assessment, it is essential that you work with LBM corporate services to ensure that the requirements of your shared service can be supported.

Discuss and develop your plans in collaboration with the experts who can help you see the art of the possible!

IT Systems and Infrastructure

Clive Cooke, Richard Warren & Alkesh Dudakia

Finance (including budgets & pensions contacts)

Bindi Lakhani & Tom Bidwell

HR (TUPE, restructures, recruitment, etc.)

Kathryn Wittams-Smith

Procurement

Dawn Jolley & Charles Baker



Further reading to help you think about the organisational side of change:

- Esther Cameron & Mike Green, 'Making Sense of Change Management: A Complete Guide to the Models, Tools & Techniques of Organisational Change'.

Self Assessment

Joint Assessment

Design

A specific focus on **culture** should be built into the development of any shared service.



Putting in place a robust shared **governance** framework to help steer the new service is vitally important.

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Key tools:

Merton Approach to Projects (MAP) methodology has a [Business Case template](#).

Be sure to use the 'Guiding Principles for Shared Services' when writing your Business Case.

Find out more [here](#).

Don't proceed without...

These lessons learned are summarised from the 'Four borough shared Legal Services close down report' by Gareth Young. You can read the full report [here](#).

- 1) Staff **ownership** – no matter how prescribed the change, the more staff can be involved in designing their new service, the better.
- 2) A **business case** detailing the **benefits** that can be expected. This must be **signed-off** before delivery commences.
- 3) A **budget** for **set up** costs that is signed off by all parties.
- 4) A **communications plan** to inform staff (& residents where applicable) of the changes to expect and the communications **channels** in place.
- 5) A **dedicated project manager** to coordinate the change and ensure adequate planning and oversight is in place.

Meet the experts...

The services that you wish to share with will have their own pool of experts; those who have created and worked in shared services, and those in corporate roles supporting shared arrangements.

Remember to share your thoughts and concerns with these people as they will often be able to help you.



It is good to rub, and polish our brain against that of others.

Michel Eyquem de Montaigne



Further reading to help you think about the organisational structure side of change:

- [Sharing the Gain: Collaborating for cost-effectiveness](#), published by CIPFA.
- [Shared Services handbook](#), published by Deloitte

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