

# Cheltenham Borough Council

## Cabinet- 9 February 2016

### 2020 Vision – Business case for sharing Customer and Support Services

<b>Accountable member</b>	<b>John Rawson, Cabinet Member for Finance</b>
<b>Accountable officer</b>	<b>Mark Sheldon, Director of Resources</b>
<b>Ward(s) affected</b>	<b>All</b>
<b>Key/Significant Decision</b>	<b>Yes</b>
<b>Executive summary</b>	<p>At Cabinet on Tuesday 13 October, as part of the agreement to the 2020 shared services partnership structure, it was agreed that further business case briefings and proposed service level agreements be received and approved by Cabinet. The documents would provide reassurance on the benefits, costs and savings to the Council and demonstrate that other sharing options had been considered, prior to delegation of those services to the Joint Committee. At Council on 19 October 2015, the Leader made a commitment that back-bench members would be given the opportunity to be involved in this process.</p> <p>Customer and support services, revenues and benefits and property services were identified within the programme as the next new CBC services to be considered for sharing and would therefore be subject to further business case briefings.</p> <p>Following consultation with the relevant Cabinet lead for the three services; Cllr. John Rawson, it was agreed that three Cabinet Member Working Groups (CMWG) should be established to ensure that as many members as possible were involved in the development of the business case briefings.</p> <p>The groups met 3 times to consider 'What, How and Why' the council should consider sharing Customer services including the consideration of other sharing options.</p> <p>The business case attached at Appendix 2 to this report analyses the options including the option for sharing with our 2020 vision partners.</p> <p>Members of the CMWG considered the options in the business case and supported the recommended option for sharing with 2020 vision partners. As such, it is recommended that Cabinet:</p>
<b>Recommendations</b>	<ol style="list-style-type: none"><li><b>1. Delegate to the 2020 Vision Joint Committee those functions for Customer Services listed at Appendix 3 subject to delegation principles in section 6.</b></li><li><b>2. Authorises the Director of Resources in consultation with the Cabinet Member Finance to undertake all necessary actions and</b></li></ol>

**processes to implement the matters set out in this report.**

<p><b>Financial implications</b></p>	<p>The business case for sharing customer services with 2020 Vision partners includes an initial target for savings of £54k p.a. by 2016/17.</p> <p>The sharing of customer services is part of the wider programme of activity which supports an alternative organisation structure which deletes the post of Chief Executive and creates the post of Head of Paid Service. The first phase of this programme will deliver savings of £150,900 in 2016/17. The further sharing of services will also deliver further savings in existing shared services e.g. GOSS, Audit and ICT of £43k in phase 3 i.e. after 2019/20.</p> <p>As a result of this related activity, the overall savings target for 2020 vision is £581k p.a. by 2020 with a potential further £227k though the establishment of a Teckal company (subject to a business case in 2016).</p> <p>The 2020 Vision programme also allows the council to access £1.5m of investment (including government Transformational Challenge Award - TCA funding) allocated for investment in business systems to support investment in technology to support a step change in delivery of the service.</p> <p><b>Contact officer:</b></p> <p><b>Nina Philippidis, Business Partner Accountant</b>  <a href="mailto:nina.philippidis@cheltenham.gov.uk">nina.philippidis@cheltenham.gov.uk</a>, 01242 264121</p>
<p><b>Legal implications</b></p>	<p>The 2020 Vision Joint Committee is being established in February 2016 and will comprise eight members (two members from each partner council). The members for Cheltenham will be Councillors Walklett and Flynn.</p> <p>The partner councils will delegate prescribed functions to the Joint Committee which will then have authority to administer and undertake those functions. The Customer Services functions being delegated by the council to the Joint Committee are set out in Appendix 3 and are subject to the reservations set in section 6 of this report. Also, the delegation of functions will be subject to the overriding principle that the Joint Committee will undertake operational work and that strategic and policy matters (except HR policies) will be retained by the council.</p> <p>The delegation of the functions and the obligations of the Joint Committee and the arrangements it has with the partner councils will be contained in the inter authority agreement.</p> <p>As the law currently stands, it is not possible for a statutory joint scrutiny committee to be established in relation to the 2020 Vision Joint Committee. Therefore, the councils' scrutiny arrangements will apply to the decisions of the Joint Committee and this includes call in of decisions.</p> <p><b>Contact officer: Peter Lewis</b>  <b>Head of Law (Regulatory);</b> <a href="mailto:peter.lewis@tewkesbury.gov.uk">peter.lewis@tewkesbury.gov.uk</a>  <b>01684 272012</b></p>

<p><b>HR implications (including learning and organisational development)</b></p>	<p>The decision to delegate customer services from the control of the Council to the Joint Committee will initially mean a change of senior manager for the Council’s customer services employees. The newly created shared senior manager post is currently being advertised internally across all 4 partner councils with interviews scheduled to take place shortly. The successful candidate will remain employed by his/her current Council but on appointment he/she will be issued with a new employment contract. The new contract will contain an express term that will place the employee at the disposal of the 2020 partner Councils. This is in line with section 113 of the Local Government Act 1972 and will remove the requirement for individual secondment agreements with all the 2020 partners.</p> <p>During the initial months following the creation of the Joint Committee, existing customer services staff will remain employed by their current Council (i.e. no change to their roles and responsibilities, terms and conditions of employment and delivering services to their current employer). The newly appointed senior manager will work with current managers and employees to co-create the new shared service structure. It is important to stress that no changes will implemented without formal consultation taking place with the two recognised trade unions and the employees involved. Following consultation on any proposed changes, new employment contracts containing the express term putting the employee at the disposal of the 2020 partner councils will be issued.</p> <p>If the need to share staff across the partnership prior to formal consultation taking place arises then this will be permissible providing the employee consents to the proposed change to his/her contract and a formal secondment agreement is put in place.</p> <p>A protocol for cost sharing and deciding which council will be the employer for new and vacant posts is currently being drafted.</p> <p>The council and the other 2020 partner councils will continue to be supported by the GOSS HR team who will ensure that all HR policies and procedures are followed and that any issues that arise are discussed with management, employees and trade union officers from the two recognised trade unions as soon as they arise.</p> <p><b>Contact officer: Julie McCarthy, GOSS HR Manager Julie.McCarthy@cheltenham.gov.uk, 01242 264355</b></p>
<p><b>Key risks</b></p>	<p><b>As outlined in Appendix 1.</b></p>

<p><b>Corporate and community plan Implications</b></p>	<p>The proposal to share customer services supports the delivery of the following council's key corporate objectives for 2015/16.</p> <p>VFM 2 - We will have developed and agreed with our 2020 Vision partner councils interim proposals to deliver services in the future together with the necessary management arrangements to implement and with member involvement.</p> <p>VFM 3 - We will develop collaborative working with partner councils and prepare for the creation of the shared customer services:</p> <p>VFM 10 - We will implement the 'Bridging the Gap' programme and budget strategy for meeting the MTFS funding gap by identifying further savings / income to close gap for 2016/17 and residual MTFS budget gap.</p>
<p><b>Environmental and climate change implications</b></p>	<p>None identified at this stage. There may be some additional travel for staff working between sites in a shared service arrangement. However, recent investment in video conferencing technology linking all four council sites and the rollout of new video phones in Cheltenham funded from the programme will ensure that this is reduced to a minimum.</p> <p><b>Gill Morris, 01242 264229, <a href="mailto:gill.morris@cheltenham.gov.uk">gill.morris@cheltenham.gov.uk</a></b></p>
<p><b>Property/Asset Implications</b></p>	<p>The further sharing of services may result in further rationalisation of space which supports the reduction in the council's space requirements which will increase the potential to deliver savings from the office relocation as part of the accommodation strategy.</p> <p><b>Contact officer: David Roberts 01242 264151, <a href="mailto:david.roberts@cheltenham.gov.uk">david.roberts@cheltenham.gov.uk</a>.</b></p>

The council has undertaken an equalities impact assessment for the service. This is contained at Appendix 5.

# 1. Background

- 1.1 At Cabinet on Tuesday 13 October, as part of the agreement to the 2020 shared services partnership structure, it was agreed that further business case briefings and proposed service level agreements be received and approved by Cabinet. The documents would provide reassurance on the benefits, costs and savings to the council and demonstrate that other sharing options had been considered, prior to delegation of those services to the Joint Committee. At Council on 19 October, the Leader made a commitment that back-bench members would be given the opportunity to be involved in this process.
- 1.2 Following consultation with the relevant Cabinet lead for the three services; Cllr. John Rawson, it was agreed that three Cabinet Member Working Groups should be established to ensure that as many members as possible were involved in the development of the business case briefings. The groups met for the first time in week commencing 30 November, for the second time on week commencing 14 December and for the final time on week commencing 4 January. The same format for the meetings was followed for each of the three services.

# 2. Cabinet Member Working Group

## 2.1 Review approach

The CMWG structured the meetings to consider the business case options as follows:

- Meeting 1 – to consider ‘What’ i.e. scoping the service, what’s in scope and what’s not, what’s important for members about what the service does, understanding budgets and defining outcomes.
- Meeting 2 – to consider ‘How’ i.e. what’s most important about how the service is delivered to our customers and what members expect to be included in the specification.
- Meeting 3 – To consider ‘Why’ i.e. review and sign-off the business case ahead of Scrutiny and Cabinet meetings.

Membership of the Cabinet Member Working Group was as follows:

<b>Customer Services</b>
Cllr John Rawson Cllr Suzanne Williams Cllr Helena McCloskey Cllr Colin Hay Cllr Max Wilkinson Cllr Matt Babbage  Mark Sheldon (Director) Judy Hibbert (Service Manager) Richard Gibson (Commissioning) Ann Wolstencroft (2020 Programme) David Neudegg (2020 Programme) Paula Burrows (2020 Programme) Phil Martin (Cotswolds DC)

The meetings were well attended and members welcomed the opportunity to comment on and review the draft business case briefings.

## 2.2 Analysis of options

The business case outlined the previous investigations into delivering savings and the current landscape for sharing and discounted a number of options. The residual options remaining and analysed further included:

- In house – ‘as is’
- 2020 Vision sharing
- Other sharing arrangements

The detailed business case is attached at Appendix 2. A summary of the option to share customer services with our 2020 vision partners is as follows:

Criteria	Customer Services
Savings/value for money	An initial savings target for the creation of the shared customer services of <b>£54k</b> has been identified, which is considered to be prudent by CIPFA and builds on the track record of savings delivered from these existing partnerships.
	<p>Sharing with four councils maximises the opportunity to benefit from economies of scale and benefits from an existing track record of working together and sharing and delivering savings from sharing e.g. GOSS and ICT.</p> <p>Existing back office is shared e.g. GOSS and the proposal to share ICT will ensure that further economies in back office will be delivered through further alignment of back office including shared ICT infrastructure. The overall business case includes further savings of £43k p.a. by 2019/20 from back office which is facilitated by further sharing.</p> <p>Maximises opportunity to share and reduce operating costs e.g. licences for systems/technology supporting the service e.g. telephony, switchboard.</p> <p>Maximises opportunity to make savings through shared purchasing e.g. system licences.</p>
Pension fund viability	Offers the potential to move to a Teckal company with stakeholder pensions which are more affordable.
Quality	The partners are developing a Customer Access Strategy to capture a programme of activity, including a digital strategy, ‘push’ out messaging to customers and potential CRM systems to improve customer services. 2020 Vision offers a significant opportunity to access £1.5m of TCA money to fund the implementation of the strategy. Any investment above the TCA funding is shared amongst four partner councils.
	<p>There is an aspiration to ensure that the existing scope and service standards are, at least, maintained despite reduced funding.</p> <p>Co-working will enable best practice to be identified and shared.</p> <p>An analysis of service functions in scope indicates a high degree of similarity between the four councils in terms of the scope of their services which should give members some reassurance that the services can be effectively shared.</p>

Criteria	Customer Services
Resilience	Sharing technology and staff resources across four partners will maximise the potential to increase resilience.
Creativity	Investment in new technology will provide opportunities for customer service to be delivered in different ways to meet customers' varying requirements.  There are some well-developed relationships across the partnership which has resulted in some significant achievements e.g. stabilisation of ICT infrastructure, which can be built on.
	Co-working will encourage and foster creativity across the partners  Maximises scope for staff progression/development and improving remuneration as demonstrated by existing models e.g. GOSS and ICT model where staff work across multiple sites.
Influence	Aspiration to ensure that separate identity, local decision making, community leadership and local knowledge is not impacted. More likely to be able to influence others e.g. government on policy, ICT providers for development or other public bodies on regional objectives.
Ability to deliver change	The structure of 2020 Vision is to group ICT and customer services under a group manager in order to deliver step change in services. This will ensure that any service development will receive focused ICT support which is fully resourced and funded.
	The 2020 Vision programme has a £10m programme of activity including funding to support key work streams including the strategy for aligning business applications which will ensure that step change is delivered within a planned timescale by 2020.  Key ICT support is available through the programme to support individual service development for service areas where all four partner councils are sharing.
Business complexity	Already sharing key back office services and are aligning policies e.g. contracts rules, procurement, cash collection and banking.  More sharing of staff using common ICT infrastructure (telephony, personal ICT kit), shared applications and approach e.g. payment card industry (pci) requirements, Public Service Network etc.; further sharing with existing partners will simplify the operating model.
Overall risk to delivery of outcomes.	<b>GREEN</b>

### 2.3 Specific CMWG service outcomes

2.4 The CMWG were asked to consider some specific questions relating to the commissioning of services resulting in the following high level outcomes for the services:

#### What do members think are the most important things (outcomes) for the council?

- Greater service resilience if things go wrong

- Greater understanding of our customers so that we can use this to meet needs and expectations
- Improving standards of service for customers
- Empowering customer service staff to be champions for our customers
- Improving efficiency of dealing with customer and community enquiries via members making sure that staff have the right tools to do their jobs

**What do members think are the most important things (outcomes) for our customers/communities?**

- Effective communication with customers through all parts of their journey e.g. emails to confirm payments, change in details etc.
- A system that already knows who the customer is and their previous interactions so they don't have to repeat personal details and it's as speedy as possible
- Meeting expectations about efficient interactions using more online technology e.g. planning application payments
- A service that is available beyond the usual 9-5.
- Avoiding customers having to repeat information across departments and potentially different partners, by investment in systems which provide 'a single view of the customer'
- Automated telephone responses used appropriately to balance resource but be mindful that this is not to everyone's taste
- Accessibility to ensure all our customers can enjoy a great service
- Customers know that they are contacting CBC (branding and phone numbers) and will benefit from speaking to staff with local knowledge

**Are there any special requirements that we need to think about if the service is shared with the 2020 partnership?**

- Interface with Ubico is very important
- Interface with CBH e.g. two area offices
- Developing a system that can be integrated and good communication with CBH and the Trust on areas of shared interest e.g. what's on in tourism, cricket?
- Must maintain link with REST and any retained services or any future devolved services.
- Service/technology solutions must be transportable in order to support the office relocation to Delta Place.
- Service design solution must be scaleable to allow more partners to join or for services to be sold.

**2.5** It is re-assuring to note that many of these outcomes are already aspirations of the 2020 Vision programme. Some of the detailed requests will be picked up by the partnership in the development and redesign of the service and the development of the Customer Access Strategy which is currently being developed to support the creation of the shared service.

**2.6 Recommendation**

In summary, the best and recommended option in the business case was for the council to progress with the 2020 Vision partnership for sharing Customer Services for the following reasons:

- Sharing under a 2020 Vision partnership is the option which has the greatest potential to deliver the outcomes framework.
- The partnership has access to overall programme investment in services of £10m and specific funding of £1.5m for ICT to finance the necessary step change in technology required to support the development of customer services. Given the council's limited



budgets it is unlikely that working alone or with fewer other councils, the council would be able to fund the likely level of investment required to acquire, implement and maintain new technologies.

- Being part of the 2020 partnership brings benefits to staff since it provides opportunities for staff for career progression/development and potential for increased remuneration where working across sites. The implementation of the Shared Customer Access Strategy provides an exciting opportunity for staff to be involved in a step change in service development. Improved technology and processes will enable staff to deliver better services and better equip them with the tools to do a good job.

The CMWG were also comfortable that the initial set of performance and service standards which reflect the 'as is' level of service and performance at Appendix 4.

**The CMWG considered the business case and were happy to support the recommended option going forward to Cabinet.**

- 2.7 As part of the process, members were asked to identify any issues that they felt scrutiny should be aware of. The only request they had was that CBC members be involved in developing the shared customer access strategy. The nature of this involvement was not determined but this is an issue that members on the Overview and Scrutiny Committee could give some thought to. The comments from Overview and Scrutiny are set out in section 9.

### 3. Service design and delivery

- 3.1 As part of the Cabinet Member Working Groups, members had a chance to consider the proposed service design and delivery arrangements. The following principles of service design have been agreed by the 2020 Member Governance Board which included:
- Residents and businesses will have access to knowledgeable support from staff that understand their localities and can support members with their decision-making.
  - Back office services will be centralised where possible and in a balanced way across the partnership, taking into account economies of scale achieved, any additional costs (e.g. initial staff travelling cost and time) and opportunities to reorganise or release office accommodation which delivers a capital sum or a rent.

In designing services to meet the outcomes specified by each council it is proposed that the following checklist is taken into account and in the design of services.

#### How the services will be delivered

Customer Focus	<ul style="list-style-type: none"> <li>• Ensuring that the customer continues to have a <b>positive experience</b> of the service.</li> <li>• How customers understand <b>who is accountable</b> for the service provided to them.</li> </ul>
Service Standards	<ul style="list-style-type: none"> <li>• Implications for the <b>nature of the service</b> and the <b>service standards</b> offered to the customer (internal and external)</li> <li>• How the <b>service offer</b> is presented to the customer, including the location.</li> </ul>
Customer, members & staff communication	<ul style="list-style-type: none"> <li>• The general implications for <b>customer</b> communication and engagement.</li> <li>• The organisation of <b>member and staff communication</b> and engagement.</li> </ul>

#### Options

Sourcing Options	<ul style="list-style-type: none"> <li>• The <b>sourcing options</b> that are most likely to meet the</li> </ul>
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	<p>outcomes.</p> <ul style="list-style-type: none"> <li>• How the partners will approach <b>collaboration</b> with other organisations.</li> </ul>
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### Accountability

Decision-making processes	<ul style="list-style-type: none"> <li>• <b>Governance:</b> how democratic decisions and delegated decision-making are organised.</li> </ul>
Performance Management	<ul style="list-style-type: none"> <li>• How <b>performance management</b> data will be managed for the new arrangements.</li> </ul>

### Implementation

People	<ul style="list-style-type: none"> <li>• Interim <b>management arrangements</b>, i.e. how employees will be organised during the transition to any new arrangements.</li> <li>• Implications for the future <b>culture</b> of the organisation.</li> <li>• Implications for the <b>terms and conditions</b> of staff.</li> </ul>
Finance	<ul style="list-style-type: none"> <li>• How costs and savings will be distributed between the partners.</li> <li>• The potential for <b>income generation</b>.</li> </ul>
Infrastructure	<ul style="list-style-type: none"> <li>• The <b>technology</b> that will enable the new arrangements to function smoothly and efficiently.</li> </ul>

**3.2** It is acknowledged that the partnership has long experience of working together through the establishment of GO Shared Services and Ubico Ltd., and it is envisaged that lessons learnt from this process will be incorporated into the design of shared services. Initially the services would be shared through a section 101 agreement which is well-recognised in the sector and an immediately recognisable model for potential new partners. This would need to be changed if the services were moved to a different model e.g. teckal company but such changes would be subject to a further report.

## 4. Proposed governance and performance management arrangements

**4.1** CBC members have consistently raised their concerns about how they will be involved in the performance and governance of shared services. This section sets out how this will happen and invites comment from Overview and Scrutiny members.

**4.2** To support the good governance and accountability of the 2020 partnership, from April 2016 we will have the following structures in place:

**4.3** A Joint Committee: A formal group made up of elected members, two from each council, this has responsibility for oversight of the Partnership Venture's performance and for approving annual service plans and performance reports for each of the Partnership Venture services. Individual Joint Committee members will provide a performance overview to relevant Cabinet leads for the constituent services and to their council's Overview and Scrutiny Committees as required.

**4.4** A Partnership Venture Commissioning Group (PVCG): It is proposed that this group, made up of the heads of paid services of each of the four councils, plus the Partnership Managing Director, takes the lead on performance reporting and links to councils' Cabinets, scrutiny and executive teams. The group will act as the commissioners of the Partnership Venture and this work will be undertaken collectively. The Commissioners will:

- Lead partner contributions to the Partnership Venture's preparation of its service plan and advises the Joint Committee on its approval
- Lead strategic thinking on behalf of the partners, advising the Joint Committee re-commissioning and de-commissioning; changes to needs and desired outcomes; changes to strategic risks and

opportunities.

- Lead on major stakeholder engagement with communities, elected members and strategic partners

**4.5** It is also proposed that the PVCG will be supported by a Client Officers Group which collectively represents the specific interests of their individual authorities in managing performance for the given service. The extent of these roles will be influenced by the level of variations in the Partnership Venture service from partner to partner and might well reduce over time as confidence in shared arrangements increases.

**4.6** **We will also have the following documents in place:**

**4.7** The Inter-Authority Agreement will contain the delegation of the functions to the Joint Committee. It will also set out the obligations of the Joint Committee and the arrangements it has with its partner councils as well as covering such matters as the formation of the Joint Committee, accounting and reporting arrangements, termination provisions and dispute resolution.

Annual Service Plans will set out the key tasks and actions, outcomes, performance measures and service standards for each council delivered by the Partnership Venture. For 2016/17 these plans will be taken from each council's existing proposed plans. As the service do not currently have a service plan in place, these will need to be developed by the end of June 2016, ready for the first quarter performance reports. These will form the basis for the future relationship between the partners and each service delivered by the partnership venture. This will enable each service to continue to meet each council's own aims and objectives. This work will commence following the appointment of the group managers and, it is anticipated that initial service plans will be in place by the end of the first quarter. It is proposed that the service delivered from April 2016 will not change. The CMWG considered detailed schedules of the functions being delegated (Appendix 3) and existing service and performance standards / approach and were comfortable with what was being delegated. An initial set of performance and service standards which reflect the 'as is' level of service and performance is attached at Appendix 4.

## **5. So how will this work for CBC?**

**5.1** Officers at CBC are currently working with our partner councils to put together detailed working arrangements of how the client officer group will operate. We expect to have two part-time client officers covering the range of CBC services shared with the 2020 partnership. Alongside 2020 services, they will also have other clienting responsibilities including the Cheltenham Trust and Ubico.

**5.2** They will be responsible for maintaining an overview of how well the partnership venture is meeting the service standards, performance indicators and needs of CBC. They will act as a conduit for information from CBC as client (both in terms of staff and elected members) to the partnership venture. They will act as a first point of contact for elected members if there are any major concerns with service delivery.

**5.3** In addition, they will need to retain links with our commissioned service providers (such as CBH, the Trust and Ubico) who are also "customers" of the shared services to make sure that they continue to receive the appropriate level of service.

**5.4** On a more formal basis, the two client officers will represent the council at a quarterly Client Officers' Group meeting that will bring together client officers from the four councils. This will be chaired by one of the Lead Commissioners (heads of paid service from the partnership venture commissioning group). The meeting will enable the client officers to share information about how well the services are being delivered and to support the Lead Commissioner to resolve any service delivery issues.

- 5.5 The outcome from the Client Officers' meeting will be that the Lead Commissioner will be in a position to effectively feedback at the PVCG performance meeting and challenge any performance issues.
- 5.6 Performance reports for the partnership venture itself and its constituent services will be brought to Partnership Venture Commissioning Group and the Joint Committee. The council will require an annual assurance process to be followed to feed into the production of the council's Annual Governance Statement.
- 5.7 The council's Head of Paid Service will then be in a position to summarise performance of the 2020 partnership for this council's Executive Board and Scrutiny Committee as appropriate.
- 5.8 In addition, each council's lead member on the Joint Committee will then be available for providing a performance overview to relevant Cabinet leads for the constituent services and to their council's Overview and Scrutiny Committees as required.
- 5.9 The 2020 Partnership Managing Director has also given an undertaking to attend Executive Board and Scrutiny Committee meetings as requested to provide updates on the programme and to respond to any concerns about the implementation of the Service Plan.
- 5.10 Given that members on the Overview and Scrutiny Committee have had previous experience of reviewing both corporate performance and the performance of our commissioned providers, their thoughts on the above will be valued.

## **6. Delegations**

- 6.1 The functions to be delegated to the Joint Committee are as set out in Appendix 3. The Joint Committee will agree its own scheme of officer delegation and officers working within the Joint Committee services will operate within that scheme.
- 6.2 In order to be able to create a functioning service, the Joint Committee and its officers will undertake day-to-day operational decisions regarding those functions that are delegated in Appendix 3. These include the management of staff and resources (delegated budget) and decisions in respect of the provision of the service e.g. response to emergencies or business interruptions. These delegations were agreed at the Members Governance Board on 21st January 2016 and will be reflected in the finalisation of the Inter Authority Agreement.
- 6.3 The delegation of the functions in Appendix 3 will be subject to the overriding principle that the Joint Committee will undertake operational work and that strategic and policy matters (except HR policies) will be retained by the council. Therefore, the setting of fees and charges for services, including charges for green waste collection, will be retained by the council. Also, strategic decisions in respect of the usage of the council's reception areas and committee/civic space will be retained by the council.

## **7. Reasons for recommendations**

- 7.1 Sharing under a 2020 Vision partnership is the option which has the greatest potential to deliver the outcomes framework in the context of reducing government support for councils.

## **8. Alternative options considered**

- 8.1 As outlined in the business case at Appendix 2.

## **9. Consultation and feedback**

- 9.1** Members of the CMWG welcomed the draft business case briefing and were happy to support this option going forward. The only request they had was that CBC members be involved in developing the shared customer access strategy. The nature of this involvement was not determined but this is an issue that members on the Overview and Scrutiny Committee could give some thought to.
- 9.2** Overview and Scrutiny committee considered the findings of the CMWG on 25/1/16. The feedback from the meeting is summarised as follows:
- 9.3** Overview and Scrutiny members welcomed the work of the Cabinet Member Working Group and were supportive of the proposals to share the service with the 2020 partnership. They emphasised their expectation that the transition to 2020 should be seamless from the customers' experience, specifically in relation to access by telephone. There was a specific comment from one member that the service will be better under 2020 due to the ability to access investment into back-office technology. Another member asked about clienting arrangements.
- 9.4** The O&S committee did not comment on the involvement of the development of the customer access strategy. However, it will be developed by officers from across the partnership with the input from the CMWG for customer services at CBC, considered by the PVCG for recommendation to the Joint Committee to agree. It will then be subject to approval by this council's Cabinet.

<b>Report author</b>	<b>Contact officer: Mark Sheldon, mark.sheldon@cheltenham.gov.uk, 01242 264123</b>
<b>Appendices</b>	<ol style="list-style-type: none"> <li>1. Risk Assessment</li> <li>2. Business case for sharing Customer and Support Services</li> <li>3. In scope services.</li> <li>4. Performance and Service Standards.</li> <li>5. Equalities Impact Assessment.</li> </ol>
<b>Background information</b>	<ol style="list-style-type: none"> <li>1. Vision 2020 programme documentation.</li> </ol>

## Risk Assessment

## Appendix 1

The risk				Original risk score (impact x likelihood)			Managing risk				
Risk ref.	Risk description	Risk Owner	Date raised	Impact 1-5	Likelihood 1-6	Score	Control	Action	Deadline	Responsible officer	Transferred to risk register
	<p>If the decision is made to exclude all or any part of the scoped service from 2020 then it will have a negative impact upon the council's ability to:</p> <ul style="list-style-type: none"> <li>• deliver savings to meet the MTFS</li> <li>• invest in technology to improve service and optimise opportunities for future savings</li> </ul>	Pat Pratley	19/1/16	3	3	9	Reduce	Cabinet to endorse proposal to share service to deliver savings and access funding to support service transformation	9/2/16	Mark Sheldon	
	If insufficient resource is available to implement new technologies then there may be a failure to realise savings and there may be a degradation to service.	Pat Pratley	19/1/16	3	3	9	Reduce	Cabinet to endorse proposal to share service to access funding to support service transformation to prevent degradation to service.	9/2/16	Mark Sheldon	
	If members' expectations are not managed then they may have expectations	Pat Pratley	19/1/16	3	3	9	Reduce	Partnership Joint Committee to agree the partnership Customer	9/2/16	Mark Sheldon	

	which cannot be delivered.							Access Strategy and Overview and Scrutiny committee to monitor performance of service.			
	If key experienced staff decide to leave then this could impact negatively upon service delivery and also timescales for the implementation of new technology	Pat Pratley	19/1/16	3	3	9	Reduce	The service redesign needs to ensure that any new structure creates exciting opportunities which help to retain and attract high quality staff.	9/2/16	Mark Sheldon	

**Explanatory notes**

**Impact** – an assessment of the impact if the risk occurs on a scale of 1-5 (1 being least impact and 5 being major or critical)

**Likelihood** – how likely is it that the risk will occur on a scale of 1-6

(1 being almost impossible, 2 is very low, 3 is low, 4 significant, 5 high and 6 a very high probability)

**Control** - Either: Reduce / Accept / Transfer to 3rd party / Close