



REPORT TO EXECUTIVE

PORTFOLIO AREA: FINANCE AND PERFORMANCE MANAGEMENT

Date of Meeting: 22 January 2007

Public

Key Decision: Yes

Recorded in Forward Plan: Yes

Inside Policy Framework

Title: SHARED SERVICES POLICY

Report of: DEPUTY CHIEF EXECUTIVE

Report reference: CE 07/07

Summary:

The draft Shared Services Policy (attached) will be considered by the Corporate Resources Overview & Scrutiny Committee on 11 January 2007. Comments will be available for consideration at this Executive meeting.

Recommendations:

It is recommended that members of the Executive consider and comment on the draft Shared Services policy, and the comments made by the Corporate Resources Overview & Scrutiny Committee from their meeting on 11 January 2007, prior to the Policy being considered by full Council on 6 March 2007.

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Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers: None

Shared Services Policy (Draft 1.0)

1.1 INTRODUCTION

The purpose of this policy is:

- to describe the City Council's approach to Shared Services
- to define roles and responsibilities within the authority for Shared Services
- to define the policy framework within which decisions can be taken about Shared Services
- to define the criteria that must be satisfied before any arrangements for Shared Services are entered into
- to define the governance arrangements within the City Council in relation to shared services

The delivery of shared services in partnership with other organisations has the potential to save money and improve quality. The decision about whether or not to share a service should always be based upon a sound business case that clearly demonstrates benefits to Carlisle City Council and the communities it serves that outweigh any costs incurred.

Carlisle City Council recognises that there are opportunities and risks associated with Shared Services. The Council's approach to risk management will ensure that the right opportunities are not missed, while ensuring minimal exposure to risk.

In order for a Shared Services arrangement to be entered into on behalf of the City Council, the criteria described in this policy must be met. Compliance with the criteria must be clearly demonstrated in the business case for sharing a particular service. The business case will be scrutinised and agreed by elected members of the City Council.

2. STRATEGIC INTENT

Carlisle City Council intends to share services wherever this supports the delivery of corporate priorities. Shared Services is not an end in itself, and will only be considered where it enables an increase in the quality and/or efficiency of service delivery.

3. COMMENTS ON THIS POLICY

If you would like to comment on or complain about this policy, please contact:

Deputy Chief Executive, Carlisle City Council, Civic Centre, Carlisle CA3 8QG.

4. POLICY DETAILS

4.1 Roles and Responsibilities

- 4.1.1 The lead officer for Shared Services is the Deputy Chief Executive. They are responsible for ensuring that officers comply with this policy and that the strategic intent of the City Council in relation to Shared Services is delivered.
- 4.1.2 The lead member for Shared Services is the Portfolio Holder for Finance and Performance Management. They are responsible for ensuring that members consider this policy when making decisions in relation to Shared Services.
- 4.1.3 The Corporate Resources Overview and Scrutiny Committee will scrutinise all business cases for Shared Services and, based on compliance with this policy and the criteria described herein, make appropriate recommendations to the Executive Committee.
- 4.1.4 Corporate Directors are responsible for developing business cases and delivering the resulting projects around Shared Services within the service areas for which they are responsible.
- 4.1.5 Decisions about shared services will lie with the Executive as long as they sit within the Policy Framework agreed by the City Council of which this policy is a part.
- 4.1.6 The Corporate Resources Overview and Scrutiny Committee will hold the Executive to account in relation to decisions pertaining to this policy.

4.2 Principles

- 4.2.1 Any shared services arrangement into which the City Council enters will conform to the following principles.
- 4.2.2 No Shared Services arrangement will be entered into unless there is a clear business case that will unambiguously benefit the citizens of the Carlisle District.
- 4.2.3 All participants to the arrangement are free and willing agents and they can expect their independence and statutory obligations to be respected.
- 4.2.4 The quality of service to the ultimate customer is not to be compromised. The prime purpose for the City Council's involvement in Shared Services is to drive up service quality.
- 4.2.5 The differences in organisational cultures and priorities, as well as legitimate variances in the local operating environments of participating organisations will be respected.

- 4.2.6 Any participant is free to form an alliance with as few or as many willing partners as they wish. For example a sub-regional agreement does not have to include every authority in Cumbria.
- 4.2.7 All costs, risks and benefits must be shared on an agreed basis. This must be agreed in advance and form part of the business case for a shared service.
- 4.2.8 There must be clear arrangements in place for management and scrutiny of alliances. The scrutiny arrangements are described within this policy – management arrangements may vary from agreement to agreement, but must be defined in the business case.
- 4.2.9 There must be an agreed process for the resolution of disputes but without prejudice to the right of withdrawal from any arrangement.
- 4.2.10 There should be no impediment to working collaboratively with the private or voluntary sector, other agencies or other local authorities outside the County or region.
- 4.2.11 There should be a common agreement to consult and involve employees and to introduce job protection arrangements as and when appropriate.
- 4.2.12 The identity of Carlisle City Council must be clearly linked to the direct delivery of appropriate services in the Carlisle District.

5. Governance

- 5.1 The correct application of this policy is the responsibility of the Deputy Chief Executive and the Executive Committee. Observance of the policy will be scrutinised by the Corporate Resources Overview and Scrutiny Committee.