

Cheshire East Council

Cheshire West and Chester Council

Shared Services Joint Committee

Date of Meeting: 30th June 2023

Report Title: Shared Service Business Planning – 2023/2024

Senior Officer: Alex Thompson, Director of Finance and Customer Services,
Corporate Services, Cheshire East Council
Laurence Ainsworth, Director of Public Service Reform, Cheshire
West and Chester Council

1 Report Summary

- 1.1 The Shared Service Joint Committee Administrative Agreement sets out that the Joint Committee is responsible for approving business plans for shared services including targets and objectives relating to service quality, performance, and efficiency.
- 1.2 This report presents the business plans for 2023/2024 for the five shared services:
1. Archaeology Planning Advisory Service
 2. Archives and Local Studies
 3. Emergency Planning
 4. ICT Shared Services
 5. Transactional Services
- 1.3 The business plans for the five shared services are set out, in full, in the appendix

2 Recommendations

- 2.1 It is recommended that Members:
- i) Approve the new business plans for the shared services for 2023/2024.

3 Reasons for Recommendations

- 3.1 The Shared Service Joint Committee Administrative Agreement sets out that Joint Committee is responsible for approving the Business Plans, or

specifications for any Services, including objectives and targets for service quality, performance, and efficiency.

4 Background

- 4.1 In accordance with the overarching Shared Services Administrative Agreement, all shared services are required to have a business plan in place which is approved by both the host authority and the receiving authority.
- 4.2 The new template introduced last year has been successful and provides for more narrative explanation if needed.
- 4.3 In accordance with the recent shared services review recommendation about reducing the reporting burden, ICT and Transactional Services will have a mid-year review and all other services will have an annual review. This will avoid disproportionate reporting pressures for the smaller shared services. However, should risks arise, more frequent reporting will take place, and services can submit update reports throughout the year as necessary.

5. 2023/2024 Business Plans

- 5.1 The table below gives a summary overview of each of the services' business plans.

Service	Budget 23/24	Number of objectives	Number of KPIs	Number of high-level risks
APAS	177,879 (provisional)	6	5	0
Archives and Local Studies	529,000	7	6	1
Emergency Planning	330,810	8	5	0
ICT	16,621,000 (gross) Net - £0	6	3	0
Transactional Services	501,000 (gross) 220,000 (net)	6	14	4

Full business plans for each service are in appendix 1.

5.2 The main priorities for 2023/24 are:

- For all services, to implement the recommendations from the recent shared service review.
- For the Archaeology Advisory Planning Service, to develop, maintain and manage a comprehensive public information resource, the Cheshire Historic Environment Record (HER), in accordance with national standards and benchmarks, and to advise on archaeological implications of developments.
- For the Archives and Local Studies Service, to deliver the projects and improve digital access, whilst continuing to fulfil statutory requirements. This risk is in relation to the renegotiation of SLA with Warrington and Halton, and this has been referred to the Joint Officer Board (JOB) for further advice.
- For the Joint Emergency Planning Service, to continue to ensure managers are trained, community resilience is increased, and there is participation in and co-ordination of Cheshire Resilience Forum (CRF) projects, planning, training, and exercises.
- For ICT, to deliver continuous improvement, achieve financial stability, and deliver the ICT review programme.
- For Transactional Services, to reduce service demands, deliver continuous initiatives in Unit 4, and to implement the Transactional Services review.

6. Implications of the Recommendations

6.1 Legal Implications

The business planning process is compliant with the Administrative Agreement requirement for the Shared Service joint Committee to oversee the services business plans.

6.2 Finance Implications

The financial implications are contained within each business plan.

6.3 Policy Implications

There are no direct policy implications.

6.4 Equality Implications

There are no direct Equality implications at this stage.

6.5 Human Resources Implications

The HR implications are contained within each individual service business plan.

6.6 Risk Management Implications

The risk implications are set out in the business plans. All high-level risks are fed into service and corporate risk registers.

6.7 Rural Communities Implications

There are no direct implications for Rural Communities.

6.8 Implications for Children & Young People/Cared for Children

There are no direct implications for Children and Young People/Cared for Children.

6.9 Public Health Implications

There are no direct implications for Public Health.

6.10 Climate Change Implications

There are no direct Climate Change implications

6.11 Ward Members Affected

This report relates to Shared Services that operate across both CEC and CWAC, therefore all wards are affected in both Councils.

7. Access to Information

Documents are available for inspection at:

Cheshire East Democratic Services
Westfields, Middlewich Road
Sandbach
CW11 1HZ
or:

Cheshire West & Chester Democratic Services
HQ Building, Nicholas Street,
Chester,
CH1 2NP

8. Contact Information

8.1 Any questions relating to this report should be directed to the following officer:

Name: Heather Grove
Job Title: Senior Manager: Business Development, Assurance, and
Collaboration
Email: heather.grove@cheshireeast.gov.uk

Name: Peter Lloyd
Job Title: Head of Transformation and Technology
Email: peter.lloyd@cheshirewestandchester.gov.uk

SHARED SERVICE BUSINESS PLANS 2023/2024

SERVICE DETAILS

Service Name	Cheshire Archaeology Planning Advisory Service
Service Manager	Mark Leah
Client Managers	Ian Hesketh (CW&C), Tom Evans (CE)

OVERVIEW

The Archaeology Planning Advisory Service (APAS) is a sub-regional service which provides advice on the archaeological implications of development to Cheshire West and Chester Council and Cheshire East Council. It also maintains the Historic Environment Record for the two authorities. The service operates as a shared service between Cheshire West and Chester and Cheshire East councils. It also provides these services to Halton Borough and Warrington Borough councils via bespoke agreements.

BUDGET SUMMARY

2023/2024 Planned Budget £	£177,879.00 (provisional)
Comments	Acting on the advice of finance, the provisional budget has been increased by 10% to cover the 2022-23 pay award and a budgeted increase in 2023-24 of a further 5%
Mid-Year Forecast £	
Comments	
End of Year outturn £	

KEY PRIORITIES AND OBJECTIVES

No.	Service Priorities/ Objectives	Date due for completion	Mid-Year Review Comments	End of Year Comments
1	To develop, maintain and manage a comprehensive public information resource – the Cheshire Historic Environment Record (HER) in accordance with national standards and benchmarks, to inform all policy and development planning decisions and for the better understanding and enjoyment of the historic environment by all.	31.3.24		
2	Respond efficiently to general enquiries to the Cheshire Historic Environment Record	31.3.24		
3	To advise on development by statutory undertakers and environmental management schemes.	31.3.24		
4	To advise on the archaeological implications of development, in line with national guidance, from pre-determination to post-determination, including the prospective impacts of minerals, waste disposal, highways, and other infrastructure proposals on the archaeological resource.	31.3.24		
5	Develop and apply initiatives to drive continuous improvement in operations to enable clients to achieve their outcomes thereby increasing customer satisfaction and providing value for money	31.3.24		
6	<p>To try and secure the outstanding shared service review recommendations:</p> <p>1. Consideration of corporate funding within both CW&C and CE to secure the digitisation of further elements of the HER (NB in the meantime APAS continues to address d the digitisation challenge with its own resources)</p>	31.3.24		

KEY PERFORMANCE INDICATORS (KPI)

No.	Key Performance Indicator Description	Previous Year Actual	Current Year Target	Midyear Actual	End of year Actual	Comments
1	% number of records reviewed in the Cheshire Historic Environment Record per annum	8%	5%			
2	% of general inquiries to the Cheshire Historic Environment Record responded to within 15 working days per annum	100%	90%			
3	Respond to 100% of Countryside Stewardship inquiries to the Cheshire Historic Environment Record within 20 working days (as required by the National Service Standard) each year	100%	100%			
4	% of archaeological development management advice to the partner authorities (Cheshire West and Chester Council, Cheshire East Council, Warrington Borough Council, Halton Borough Council) responded to within 15 working days per annum	100%	100%			
5	Delivery of annual APAS Report	Achieved	Delivery of report by May 2024			

KEY RISKS

Number	Key Risk Description	Initial Risk Rating	Midyear Rating	End of year Rating	Comments
1	No key risks scoring 9 or over identified				

ISSUES SUMMARY

Number	Issue Description	Date issue arose	Date issue closed	Comments
1	No issues identified			

APPROVAL

Approval	Name	Job title	Date Agreed
Service Manager	Mark Leah	Team Leader APAS	27/04/2023
Client Manager CEC	Tom Evans	Interim Environmental Planning Manager	10/05/2023
Client Manager CWC	Ian Hesketh	Manager, Total Environment	27/04/2023
Head of Service/Director	Rob Charnley	Acting Director, Economy, and Housing	10/05/2023

SERVICE DETAILS

Service Name	Archives and Local Studies
Service Manager	Paul Newman
Client Managers	Rachel Foster (Cheshire West and Chester)/Helen Paton (Cheshire East)

OVERVIEW

Cheshire Archives and Local Studies (CALS) is an Accredited Archive service based at the Cheshire Record Office in Chester, with an extensive digital presence. It is a shared service and part of a nationwide network of statutory archive provision. CALS identifies, collects, and cares for archives and publications that are the evidence of Cheshire communities' lives past and present. It delivers access for all archives and local studies collections for information, learning and enjoyment and work to make sure archives survive so that future generations will be able to do the same.

The service is responsible for:

- acting as the corporate memory for its parent bodies and their predecessors
- collecting and providing access to a comprehensive range of original records and archives to reflect the development of the County of Cheshire and its communities
- maintaining a comprehensive collection of local studies materials and ensuring the supply of appropriate materials to libraries across the County
- promoting and developing interest in all aspects of the history of the County
- providing advice and guidance on all aspects of record-keeping and local and family history

The service also provides core archive provision to Halton and Warrington Borough Councils under a single Service Level Agreement.

CALS' priority at present, other than continuing to deliver high quality public services, is its project – 'Cheshire's archives: a story shared' - to relocate the service and engage a wider audience with archives across Cheshire. In November 2022 its application to the National Lottery Heritage Fund for £4.5m was successful and the project to relocate the service is within the capital programmes of both councils. The project will begin in Q1 2023/24 and run until Spring 2027, with new centres for the service opening in Winter 2024/25.

BUDGET SUMMARY

2023/2024 Planned Budget £	£529,000
Comments	
Mid-Year Forecast £	
Comments	
End of Year outturn £	

KEY PRIORITIES AND OBJECTIVES

No.	Service Priorities/ Objectives	Date due for completion	Mid-Year Review Comments	End of Year Comments
1	Deliver year 1 of the 'Cheshire's archives: a story shared' project Activity Plan (community engagement plan), including ongoing evaluation	March 2024		
2	Complete year 1 of the 'Cheshire's archives: a story shared' project Collections Conservation Plan, preparing the collections for their move to the new centres	March 2024		
3	Continue to improve digital access to services and collections <ul style="list-style-type: none"> Complete year 1 of the 'Cheshire's archives: a story shared' project Digital Plan Work with Ancestry to complete their digitisation programme 	March 2024		

No.	Service Priorities/ Objectives	Date due for completion	Mid-Year Review Comments	End of Year Comments
4	<p>Continue to fulfil the statutory duty of Councils under the 1972 Local Government Act to make proper provision for the archives in their care</p> <ul style="list-style-type: none"> Design and implement new digital preservation solution for the long-term preservation of digital records 	Autumn 2024		
5	<p>Provide a high-quality service for researchers and volunteers</p> <ul style="list-style-type: none"> Deliver volunteer programme as identified in year 1 of 'Cheshire's archives: a story shared' Researchers (on-site and remote) receive a high-quality service 	March 2024		
6	<p>Deliver access to services through libraries</p> <ul style="list-style-type: none"> Deliver part of relocation project Activity Plan with/in libraries Library staff training 	March 2024		
7	<p>Develop and deliver year 1 of staff training programme as identified within the Cheshire's archives: a story shared' project</p>	March 2024		

KEY PERFORMANCE INDICATORS (KPI)

Number	Key Performance Indicator Description	Previous Year Actual	Current Year Target	Midyear Actual	End of year Actual	Comments
1	Percentage of enquiries and digitisation requests fulfilled within 10 working days	99%	95%			
2	Accredited Archive status maintained	Maintained	Maintained			
3	Satisfaction with Activity Plan events	NEW	90%			Detailed Evaluation Plan to be developed as part of project during summer 2023
4	Levels of engagement with service	1.536 million	1.75 million			Includes use of CALS collections on partner website (Find My Past)
5	Percentage of volunteers who would recommend volunteering to their friends	100%	95%			Held each June, to coincide with Volunteers' Week
6	Percentage of new collections of archives made accessible to service users within 1 month of receipt	82%	90%			

KEY RISKS

Number	Key Risk Description	Initial Risk Rating	Mid-year Rating	End of year Rating	Comments
1	Renegotiation of SLA with Warrington and Halton not concluded successfully, resulting in missing opportunities to support respective priorities and inability to deliver new service model	9			Way forward to be discussed at JOB 7/6

ISSUES SUMMARY

Number	Issue Description	Date issue arose	Date issue closed	Comments
1	None identified			

APPROVAL

Approval	Name	Job title	Date Agreed
Service Manager	Paul Newman	Archives and Local Studies Manager	24/5/23
Client Manager CEC			
Client Manager CWC	Rachel Foster	Head of Communities, Culture and Libraries	24.05.23
Head of Service/Director	Rachel Foster	Head of Communities, Culture and Libraries	24.05.23

SERVICE DETAILS

Service Name	Joint Cheshire Emergency Planning Team (JCEPT)
Service Manager	Chris Samuel
Client Managers	Vanessa Griffiths (CW&C)/ Tom Shuttleworth (CE)

OVERVIEW

The overarching aim of the Shared Emergency Planning Service is to ensure that both Cheshire West and Chester Council, and Cheshire East Council, have the capability to respond effectively and efficiently to any major emergency in support of their communities, and the multi-agency response. Key objectives for the 2023-24 Business Plan are as follows: consolidation of foundation emergency management tasks; catching up on objectives put on hold from 2022-23; learning lessons from a range of incidents including the pandemic; getting ready for the new Martyn's Law; and a number of subject and site-specific plans and exercises. This work is set against a background of a need to bolster future team capacity and resilience; this includes the proposed implementation of career grades for junior officers, and the formalisation of the swift redeployment of additional staff from both Councils should the team need reinforcing during future, long-term incidents – a feature of recent years.

BUDGET SUMMARY

2023/2024 Planned Budget £	£330,810
Comments	This budget includes estimated uplift budgets subject to confirmation of pay awards later on this year.
Mid-Year Forecast £	
Comments	
End of Year outturn £	

KEY PRIORITIES AND OBJECTIVES

No.	Service Priorities/ Objectives	Date due for completion	Mid-Year Review Comments	End of Year Comments
1	Continue implementation of the Emergency Management Training & Exercise Programme.	31/03/2024		
2	Continue implementation of the off-site planning and exercise regime to ensure that both authorities meet their statutory emergency planning obligations under the COMAH, REPPiR, PSR, and Flood & Water Management legislation.	31/03/2024		
3	Ensure relevant On-Site and Off-Site Response Plans for CW&C and CE Reservoirs (as per Flood & Water Management Act, 2010) are revised and tested.	31/03/2024		
4	Increase community resilience and emergency preparedness levels by continuing the implementation of medium and long-term projects.	31/03/2024		
5	Increase levels of emergency preparedness across both authorities generally.	31/03/2024		
6	Undertake and participate in appropriate incident debriefs internally and at a multi-agency level for Major Incidents in CW&C and CE.	31/03/2024		
7	Continue participation in and co-ordination of Cheshire Resilience Forum (CRF) projects, planning, training, and exercises.	31/03/2024		
8	Develop and apply initiatives to drive continuous improvement in operations to enable clients to achieve their outcomes thereby increasing customer satisfaction and providing value for money.	31/03/2024		

KEY PERFORMANCE INDICATORS (KPI)

Number	Key Performance Indicator Description	Previous Year Actual	Current Year Target	Mid-year Actual	End of year Actual	Comments
1	Overall delegate satisfaction with training events provided, i.e., Very Good, Good or Satisfactory.	100%	100%			
2	All CEC Senior Managers (M5 and above) have attended an Emergency Management (EM) Workshop within last 24 months.	97%	100%			
3	All CW&C Senior Managers (Tiers 1 to 4) have attended an EM Workshop within last 24 months.	97%	100%			
4	Statutory plans and exercises delivered within agreed timescales	100%	100%			
5	Major Incidents/ Major Incident Standbys responded to by Duty Emergency Planning Officer within appropriate timescales.	100%	100%			

KEY RISKS

Number	Key Risk Description	Initial Risk Rating	Mid-year Rating	End of year Rating	Comments/ Mitigation
1	No high risks (scoring 9 or over) have been identified risks				

ISSUES SUMMARY

Number	Issue Description	Date issue arose	Date issue closed	Comments
	N/A			

APPROVAL

Approval	Name	Job title	Date Agreed
Service Manager	Chris Samuel	Senior Manager – Emergency Planning	23/05/2023
Client Manager CEC	Tom Shuttleworth	Interim Director, Environment and Neighbourhood Services, Cheshire East Council	25/05/2023
Client Manager CW&C	Vanessa Griffiths	Head of Public Protection Service, Cheshire West, and Chester Council	25/05/2023
Head of Service/Director	Vanessa Griffiths	Head of Public Protection Service, Cheshire West, and Chester Council	25/05/2023

SERVICE DETAILS

Service Name	ICT Shared Services
Service Manager	Gareth Pawlett
Client Managers	Peter Lloyd, Valda Williams

OVERVIEW

- ICT Shared Service is a shared service managed by Cheshire East (CEC) Council on behalf of both Councils. It currently manages multiple diverse devices, infrastructures and application sets belonging to the two Councils and related partner organisations.
- The shared service provides:
 - Devices - Core IT End User Computing (EUC) Platform, Microsoft365,
 - Infrastructures - A single managed service for the provision of network and communications,
 - Hybrid data platform - A hybrid EUC and applications platform, co-located across Microsoft's Azure platform and the Datacentre in Kelly House,
 - User support services - comprising of the IT Service Desk and three levels of support in line with well recognised service management standards (ITIL v3) covering devices, infrastructure, and applications,
 - IT security, architecture and change management, project management and applications development and,
 - IT for several other organisations across Cheshire, comprising schools, wholly owned trading companies and strategic partnerships/joint ventures.

BUDGET SUMMARY

2023/2024 Planned Budget £	£16,621,000 Gross £0 net
Comments	
Mid-Year Forecast £	
Comments	
End of Year outturn £	

KEY PRIORITIES AND OBJECTIVES

No.	Service Priorities/ Objectives	Date due for completion	Mid-Year Review Comments	End of Year Comments
1	Implement the recommendations from the Shared Service Review for ICT. <ul style="list-style-type: none"> - Mobilisation - June 23 - Design Phase – Sept 23 - Technology Change - Sept 24 - Workforce alignment - Oct 24 - Soft Launch & Disaggregation - Mar 25 	31/03/2025		
2	Continuous Improvement – delivery of a jointly agreed service improvement plan based on the following key themes: New Business, Delivery on commitments, new metrics (security and compliance), User experience, Process improvement and Operational Strategy; with an associated Performance Management Framework (PMF).	31/03/2024		
3	Culture - To ensure all senior managers are highly visible and consistently display the positive behaviours of the council. To ensure all staff have the skills, support, and frameworks to enable them to be successful and to deliver effective services. To ensure the service embraces change and champions the cultural standards, values and behaviours which will be beneficial to our shared service partners.	31/03/2024		
4	Strategy and Design - Refresh of Strategic Roadmaps (Infrastructure / Applications) to improve business planning processes and product support. Review of Technical Debt Register to inform business planning	31/03/2024		

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	and to assist with simplification and cost optimisation work. Deliver Essential Replacement activity to ensure ICT Services are performant and compliant. Strategic engagement with suppliers to exploit ICT Investment and support transformation.			
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No.	Service Priorities/ Objectives	Date due for completion	Mid-Year Review Comments	End of Year Comments
5	Governance - To provide a framework of governance to ensure the provision of robust information, intelligence, and business cases to support effective decision-making.	31/03/2024		
6	Financial Sustainability - To ensure the ICT Shared Service operates at the optimal cost base to support the Councils, challenging existing service delivery models whilst maximizing resource utilisation.	31/03/2024		

KEY PERFORMANCE INDICATORS (KPI)

Number	Key Performance Indicator Description	Previous Year Actual	Current Year Target	Midyear Actual	End of year Actual	Comments
1	Annual Customer Satisfaction Survey covering full range of services	75%	75%			
2	Delivery of projects to time, cost, and quality milestones	87.2%	75%			
3	Availability of basket of critical systems and services	99.6%	99.0%			

KEY RISKS

Number	Key Risk Description	Initial Risk Rating	Midyear Rating	End of year Rating	Comments
1	<p>Information management, data security (including Cybersecurity)</p> <p>Corporate policies, protocols, tools, and technologies for the authority continue to be developed, with information management maturity and staff understanding and working practice</p> <p>The lack of a consistent approach to information management may result in security and safety breaches, leading to the loss of confidentiality and potential disclosure of sensitive personal information.</p> <p>This lack of consistency may also result in difficulties in timely access to key information. Decisions based on poor or absent data may result in a failure in service delivery.</p> <p>In conjunction, ineffective data security measures may lead to the inappropriate use of data, data protection issues and fraud resulting in loss of reputation and financial penalties.</p>	16			<p>The threat level is as high as ever, supply chain attacks have significantly increased, Council examples include Mobisoft/Capita etc. National Cyber Security Centre warning of attacks on managed service providers.</p>

ISSUES SUMMARY

Number	Issue Description	Date issue arose	Date issue closed	Comments
1	The original budget is based on the business model of 100,000 commissioned hours. Any reduction in commissioned hours will reduce income and put pressure on the outturn position.	01/04/2023	31/03/2024	<p>All parties are reviewing the demand plan with initial estimates that there will be between 75,000 and 80,000hrs commissioned demand for 2023/24. NOTE: This includes the demand from implementing the due diligence recommendations.</p> <p>The Shared Service will work hard to mitigate the loss of income as far as possible (by reducing agency hours etc). However, the extent of the loss of income (yet to be determined) could be such that it has been difficult to offset further without impacting BAU services. Cost pressures from contracts are expected to continue with suppliers indicating a continued increase in costs in coming months.</p>

APPROVAL

Approval	Name	Job title	Date Agreed
Service Manager	Gareth Pawlett	Chief Information Officer/ Head of ICT Services	
Client Manager CEC	Valda Williams	ICT Business Planning and Compliance Manager	
Client Manager CWC	Peter Lloyd	Head of Change and Technology	
Head of Service/Director	Alex Thompson	Director of Finance and Customer Services	

Shared Service Business Plan 2023 to 2024

SERVICE DETAILS

Service Name	Transactional Services
Service Manager	Jude Green
Client Managers	Paul Goodwin

OVERVIEW

Transactional Services is a shared service managed by CWAC on behalf of both Cheshire East (CEC) and Cheshire West and Chester (CWAC) councils. It consists of multiple diverse teams providing services to both councils, council businesses, schools, academies and Cheshire Pension Fund

The shared service provides:

- Payment and Income
- Recruitment and Pay
- Functional Governance and Support for UNIT4

BUDGET SUMMARY

2023/2024 Planned Budget £	£5.01m (gross) offset by £4.79m income target = £0.22m (net)
Comments	<p>The budget is currently being reviewed as part of the Pay Mechanism work which is reviewing all the transactions being processed to ensure the correct information is being captured that reflects the work of the service and this is apportioned fairly between the Councils.</p> <p>In recognition of the implementation of UNIT4, reduction in income from schools buying back services and to mitigate staffing overspends for 23/24 a service review across Transactional Services was undertaken. The budgeted policy option was to reduce staffing budgets by £0.506m and has been achieved predominately through the deletion of vacancies and voluntary redundancy.</p>
Mid-Year Forecast £	
Comments	
End of Year outturn £	

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KEY PRIORITIES AND OBJECTIVES

Number	Service Priorities/ Objectives	Date due for completion	Mid Year Review Comments	End of Year Comments
1	Develop and apply initiatives to reduce demand on all areas within Transactional Services working with clients to achieve the outcomes thereby increasing capacity within the shared service	31.03.24		
2	Ensure Transactional Services operates at the optimal cost base to support the Councils, reviewing the existing pay mechanism model whilst maximizing resource utilisation, creating a sustainable Shared Services structure to support the Councils and their partners.	31.03.24		
3	To complete the outstanding shared service review recommendations	31.03.24		
4	Continue implementation of the Transactional Services service review	30.06.23		
5	Ensure all senior managers are visible and consistently display the positive behaviours of the council enabling all staff to have the skills, support, and frameworks to be successful and deliver effective services. To ensure the service embraces the cultural standards, values and behaviours which will be beneficial to our shared service partners.	31.03.24		
6	Develop and apply initiatives to drive continuous improvement in the use of UNIT4 to realise the potential of the system and enable clients to achieve their outcomes thereby increasing customer satisfaction and providing value for money.	31.03.24		

KEY PERFORMANCE INDICATORS (KPI)

Payment & Income															
KPI	22/23	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	TARGET	OUTTURN
Payment to Supplier within terms	98.85													90%	
Timely and accurate resolution of unallocated income	87.42													85%	
Timely and accurate Direct Debits Collected	100													90%	
Resolving issues at first point of contact schools	93													90%	
Resolving issues at first point of contact Services	91.58													90%	
volume of invoices	69271														

Recruitment & Pay															
KPI	22/23	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	TARGET	OUTTURN
Confirmation and Final Contractual Documents of Employment provided for each new employee within 5 working days of complete and accurate information being received (exc schools)	74													95%	
Confirmation and Final Contractual Documents of Employment provided for each new employee within 5 working	74.5													90%	

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days of complete and accurate information being received															
Percentage of pay made accurately and on time (EXC Schools/Users)	98.72													99%	
Percentage of pay made accurately and on time	98.33													98%	
Issues Resolved at first point of contact	No data													90%	

Governance & Support															
KPI	22/23	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	TARGET	OUTTURN
Percentage of INCIDENT halo tickets received within 5 working days of receipt	69.07													90%	
Percentage of INTERNAL SERVICE request halo tickets closed within 5 working days	65.60													85%	
Percentage of fully completed POSITION ADMINISTRATION FORMS actioned within 5 working days	93.67													90%	
Percentage of HELPDESK calls answered	90													95%	

KEY RISKS

Number	Key Risk Description	Initial Risk Rating	Mid year Rating	End of year Rating	Comments
1	Continued loss of income from schools	10			
2	Capacity within service to continue to bed in UNIT4 developments	10			
3	Health and Wellbeing of officers within shared service due to significant work pressures	10			
4	Ability to deliver within budget given additional demands being placed on the team due to Unit 4 still not being embedded.	10			

ISSUES SUMMARY

Number	Issue Description	Date issue arose	Date issue closed	Comments
1				
2				

APPROVAL

Approval	Name	Job title	Date Agreed
Service Manager	Jude Green	Head of Transactional Services	
Client Manager CEC	Paul Goodwin	Head of Finance	20/06/2023
Client Manager CWC			
Head of Service/Director	Debbie Hall	Director of Finance	

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