

Supporting smaller training independent training providers in collaborative contracting

Guidance for LSIS advisers: using the shared services toolkit

Shared services

The following table provides guidance on how LSIS advisers can use each resource in the shared services toolkit. The first column shows the text that is likely to be uploaded to the Excellence Gateway. This explains what the overall toolkit is designed to achieve followed by a description of each section, along with a brief introduction to each individual resource. The second column provides additional guidance for LSIS advisers to help them judge when and how to use the resource with partnerships and providers. The third column shows the location and file name of each resource or the relevant web link.

Notes

Description / what is this resource	Links and / or resource location Application / how can you use this resource as an adviser
<p>What is this resource? SS2_framework_for_SS</p> <p>This resource is adapted from the extensive research carried out by the National College for Leadership of Schools and Children’s Services on models of leadership.</p> <p>It is a six-page resource outlining a six step method of collaborative leadership and governance design, followed by a practical activity for partners. The emphasis is on step three – types of shared provision.</p> <p>By the end of this section, providers and partnerships will:</p> <ul style="list-style-type: none"> ▪ understand the four key components of collaborative leadership and governance design; ▪ access the six steps model on shared leadership and governance; ▪ pool partner responses in each area of the six steps or have revisited step three, to lead into an action plan. <p>How can we use this resource?</p> <p>This is an useful tool to consider in the early days of partnership working as it will help you decide on practical, yet key issues such as:</p> <ol style="list-style-type: none"> 1. shared purpose and vision (why are we doing this?); 2. defining the partnership (who’s in/who’s out, and who’s close by?); 3. types of shared provision (what will we do together?); 4. form and location of leadership (who’s in charge?); 5. boundaries and form of governance (who keeps their eye on it?); 6. new relationships and alliances beyond the partnership (who can we work with now?). <p>Tips for providers</p> <p>The six-step method provides a useful framework to think about the fit of the other five</p>	<p>SS2_framework_for_SS</p> <p>Word document located on the Excellence Gateway and your CD Rom</p> <p>You can also find this resource in shared leadership and governance. This resource is included here so partnerships and providers can see that a shared service, or step three, is part of a larger process. Encourage partners and partnerships to consider steps one and two if they have not already done so.</p> <p>I have based this resource on an excellent “Exploring Models of Leadership Toolkit” produced by the National College. You can purchase a hard copy for £10 or download the various sections for free from: http://www.nationalcollege.org.uk/index/leadershiplibrary/publications/publications-practical-resources/exploring-models-leadership-toolkit.htm</p>

<p>specialist LSIS support areas.</p> <p>You may have already accessed this resource from the Shared Leadership and Governance section. This version has been adapted to focus on the shared services element.</p>	
<p>Resource title: SS3_top_tips</p> <p>What is this resource? A two-page worksheet, based on the Association of Colleges (AOC) Pocket Guide to Shared Services.</p> <p>By the end of this section, providers and partners will:</p> <ul style="list-style-type: none"> ▪ be familiar with 10 handy tips or principles for effective shared services activity; ▪ have begun forming an action plan across the partnership. <p>How can we use this resource? You can use this as an introduction to the principles of effective shared services: this is a light touch springboard for more detailed activity. It aims to develop a common understanding of shared service principles across partnerships.</p> <p>Tips for partnerships This is a short introduction to the principles of effective shared services activity. Use this with the next resource to follow up any of the 10 tips / principles in detail, SS4_pocket_guide</p>	<p>SS3_top_tips Word document located on the Excellence Gateway and your CD Rom</p> <p>This is a useful light touch resource to encourage partners and partnerships to start thinking about what it means to share services effectively. Based on best practice, it provides space to capture initial thoughts.</p> <p>http://www.aoc.co.uk/download.cfm?docid=F9163640-8111-46CE-A00E8196A878B4D0</p>
<p>Resource title: SS4_pocket_guide</p> <p>What is this resource? This pocket guide distils good practice in shared services, and presents them in 10 handy tips. This resource will help deepen your thinking about approaching shared services in a partnership.</p>	<p>SS4_pocket_guide PDF document located on the Excellence Gateway and your CD Rom. The web link is: http://www.aoc.co.uk/download.cfm?docid=F9163640-8111-46CE-A00E8196A878B4D0</p>

<p>By the end of this section, providers and partners will:</p> <ul style="list-style-type: none"> ▪ understand what constitutes a shared service; ▪ identify typical barriers to sharing services; ▪ understand 10 principles underpinning effective practice in sharing services across partners; ▪ have access to a range of resources. <p>How can we use this resource? Although the pocket guide is aimed at colleges, the 10 tips are very relevant to providers who are thinking about sharing services.</p> <p>Tips for partnerships Do follow up some of the links provided in tip 9: “learn from others” i.e. visit the Shared Service Architects’ website www.sharedservicearchitects.co.uk that has over 500 shared service reports, articles and business case studies.</p> <p>The previous resource SS3_top_tips provides an activity you may want to consider undertaking with partners.</p>	<p>A useful resource to signpost to providers and partnerships if they want to follow up any of the tips / principles from the previous resource, SS3</p>
<p>Resource title: SS5_activity_pack</p> <p>What is this resource? This five-part activity pack is based on a report commissioned by the national LSC in March 2010, examining shared services in further education.</p> <p>By the end of this section, providers and partnerships will:</p> <ul style="list-style-type: none"> ▪ decide on a definition of shared services which supports the activities of the partnership; ▪ explore the most appropriate structure for shared services for their partnership; ▪ begin formulating their own set of critical success factors for shared services projects; ▪ apply learning to their own context by discussing shared services case studies; ▪ understand the importance of carrying out research to capture stakeholder views on shared project services. 	<p>SS5_activity_pack Word document located on the Excellence Gateway and your CD Rom</p> <p>This 5 part activity pack is divided into 2 sections:</p> <ol style="list-style-type: none"> 1. guidance notes on pages 1 – 2 on each activity, its aims, facilitator guidance and resource requirements; and 2. five activities and all resources. <p>Select which activities will be most appropriate to the providers and partnerships you are working with. Start with the guidance notes. We have designed all the activities to be interactive and to used within small groups. However, you may customise them to suit the needs of the providers and partnerships you are working with.</p>

<p>How can we use this resource? Five activities are included and you can dip in and out of this pack depending upon the needs of your partnership. The activities are:</p> <ol style="list-style-type: none"> 1. definitions of shared services; 2. collaboration or control? 3. critical success factors; 4. shared services case studies; 5. stakeholder views on shared services. <p>Tips for partnerships The next resource, SS6, is the source document for this 5 part activity pack, and providers and partnerships may want to follow up specific areas arising from the activities in further detail.</p>	<p>All activities are based on the next resource, SS6 and some providers and partnerships may want to access the full report to consolidate key points, arising from this activity/ ies.</p>
<p>Resource title: SS6_LSC_research_report</p> <p>What is this resource? The purpose of this 65 page report is to communicate research findings to identify the support required by the further education sector to take forward a shared services model(s), and to identify gaps in current support arrangements.</p> <p>By the end of this section, providers and partnerships will:</p> <ul style="list-style-type: none"> ▪ understand definitions of shared services and related forms of structures; ▪ examine the scope of possible shared services; ▪ identify typical barriers and critical success factors; ▪ understand the importance of risk analysis; ▪ have access to a range of tools and templates which were used in the original research. <p>How can we use this resource? This is a useful, yet long document. Use the contents page to follow up specific areas in detail.</p>	<p>SS6_LSC_research_report Word document located on the Excellence Gateway and your CD Rom. The web link is: http://www.aoc.co.uk/download.cfm?docid=95CB511A-7CBA-4C2E-B0A1B961FD2F4BFE&doc_type=msword</p> <p>There is a lot to learn from this document for advisers. It covers all the issues facing colleges, which are also relevant to training providers. The report is a comprehensive reference for Advisors. Key areas of interest are highlighted below:</p> <p>Page 4 outlines barriers to further developments</p> <p>Page 22 outlines in greater depth areas that could be considered for sharing. The list is extensive and could be helpful when talking to training providers. This list has been incorporated into the next resource, SS7</p>

<p>Tips for partnerships Elements of this document have been adapted to form an activity pack SS5_activity_pack that is located in the previous section. This will help you to navigate the document in a practical way with partners.</p>	<p>Page 24 explores barriers, and would help advisors when speaking to providers. It unpacks all the key issues applicable to FE (also relevant to training providers). It includes VAT, TUPE and pensions, competitions law, information technology, transition-related human resources management, collaboration and quality and performance</p> <p>Page 32 focuses on critical success factors and provides actual examples that could be useful to help providers and partnerships articulate their own. Activity 3 from resource SS5 is based on this section.</p> <p>Page 33 provides a review of all existing projects. These may be good case studies to quote. Activity 4 from resource SS5 is based on this section.</p> <p>Page 40 shows a risk register which is helpful and focuses upon the risks inherent in sharing services. Further resources are available in the managing risk toolkit to support work in this area.</p> <p>Page 47 includes the template used for interviewing colleges in this research, and may be helpful when speaking with providers. Activity 5 from resource SS5 is based on this section.</p>
<p>Resource title: SS7_which_shared_service</p> <p>What is this resource? This is an eight page diagnostic to review what may or may not be in scope for sharing in each partner organisation.</p> <p>By the end of this section, providers and partnerships will:</p> <ul style="list-style-type: none"> • review the current situation at each provider in relation to management structures and key support services; • undertake a financial analysis; • explore the cultural and human resource implications of sharing resources; • undertake a risk assessment; 	<p>SS7_which_shared_service Word document located on the Excellence Gateway and your CD Rom</p> <p>This diagnostic resource provides a process, which you can take providers and partnerships through. It will require detailed follow up work and can potentially be an intensive activity. See resource SS11 for further templates that could support detailed activity.</p>

<ul style="list-style-type: none"> develop a provider and partnership action plan to progress shared services projects. <p>How can we use this resource? Use this tool to work through the most relevant areas for you and your partnership.</p> <p>Tips for partnerships Further detailed analysis will be required for specific areas and this will take time.</p>	
<p>Resource title: SS8_briefing_paper</p> <p>What is this resource? This is an informative four page briefing paper with a supporting power point.</p> <p>By the end of this section, providers and partners will:</p> <ul style="list-style-type: none"> consider the drivers, opportunities and latest research on the benefits and barriers of sharing services; explore most appropriate business models and vehicles for sharing services; identify current progress against a five step model; undertake a “confidence” self-assessment, checking on the building blocks in place for sharing services across partners. <p>How can we use this resource? This short resource can have many uses: as a briefing document, raising awareness of latest thinking on shared services or as part of a training session.</p> <p>Tips for partnerships A PowerPoint, used at an AOC conference, also supports this resource. The PowerPoint can be identified from the web site as “Shared services brief – 12/07”</p>	<p>SS8_briefing_paper</p> <p>PDF document located on the Excellence Gateway and your CD Rom. The web link is: http://www.aoc.co.uk/download.cfm?docid=8B3460DF-677F-4B79-AB2BFEE3186C3662</p> <p>We recommend this very useful and short briefing paper as essential reading for advisers. The next resource, SS9, is an Association of College’s (AOC) PowerPoint adaption of this paper.</p> <p>http://www.aoc.co.uk/aoc/filemanager/root/site_assets/aoc_publication_team/aoc_shared_services_awareness_seminar_july_2010.ppt</p>
<p>Resource title: SS9_seminar</p>	<p>SS9_seminar</p> <p>PowerPoint presentation located on the Excellence Gateway and your CD Rom. The web link is:</p>

<p>What is this resource? A PowerPoint based on SS6_LSC_research_report.</p> <p>By the end of this section, providers and partners will:</p> <ul style="list-style-type: none"> ▪ consider drivers for shared services; ▪ identify shared services opportunities and who is currently sharing services; ▪ explore most appropriate business models and vehicles for sharing services; ▪ spot key constraints; ▪ identify when it is right to share; ▪ be able to access support and help. <p>How can we use this resource? This presentation fast tracks the strategic awareness of partners, on the emerging opportunities for shared services as a means to deliver efficiencies, service improvements and organisational resilience. Use it with the previous resource SS8_briefing_paper, if appropriate.</p> <p>Tips for partnerships Although the original audience is further education colleges, the messages are just as relevant to independent training providers considering sharing services through a partnership approach.</p>	<p>http://www.aoc.co.uk/aoc/filemanager/root/site_assets/aoc_procurement_team/aoc_shared_services_awareness_seminar_july_2010.ppt</p>
<p>Resource title: SS10_cumbria_project_plan</p> <p>What is this resource? This interactive presentation charts a journey from “a good idea” to fully shared IT services across local authorities.</p> <p>By the end of this section, providers and partners will:</p> <ul style="list-style-type: none"> ▪ understand the project plan in relation to nine key task areas; ▪ be introduced to a variety of tools and templates they can use to assess, implement and maintain shared services i.e. SWOT, business case checklists, policies, stakeholder analysis and communication plans; ▪ understand core parts of the change process such as communications, project 	<p>SS10_cumbria_project_plan PowerPoint presentation located on the Excellence Gateway and your CD Rom.</p> <p>This is a very comprehensive interactive PowerPoint, which provides a detailed project plan of a shared service from “a good idea” to fully shared IT services implemented across local authorities. We recommend familiarising yourself with the resource and using it as needed with providers and partnerships.</p> <p>Please note the resource can be a little slow when you use it as there are so many templates embedded within it.</p>

<p>planning and cultural change.</p> <p>How can we use this resource? You can work through the resource at your own pace, drilling into the toolkit to access templates and resources or bypass areas you have prior knowledge or experience of. The toolkit enables you to see a complete shared service process from inception through to implementation to maintenance.</p> <p>Tips for partnerships This is an interactive PowerPoint. It contains completed templates and proformas that you can access, as well as empty ones, which you can adapt and use.</p>	
<p>Resource title: SS11_reference_material</p> <p>What is this resource? A two-page document listing three websites and two source documents, for those interested in undertaking further research into shared services. The four documents are embedded into the resource, making for easy access.</p> <p>How can we use this resource? This is further reading for partnerships, who are interested in finding out more about shared services.</p> <p>Tips for partnerships The Shared Services Architects toolbox and the Shared Services Decision Support Process websites provide a range of comprehensive tools and templates to progress shared services activity across your partnership.</p>	<p>SS11_reference_material Word document located on the Excellence Gateway and your CD Rom</p> <p>Do have a look at the websites and accompanying notes referenced in this resource. There are numerous tools and templates you can use to follow up the diagnostic undertaken as part of resource SS7 i.e. stakeholder analysis framework, force field framework, risk analysis, readiness assessments etc.</p>