

# Shared Services in adult learning



**Bulletin 4**

**March 2013**

In our third bulletin (issued in October 2012) we were able to report on the findings which were starting to emerge from the initial reports from the two Pathfinder projects funded by the Shared Services Project. The eight Challenge Fund projects, smaller scale collaborative partnerships funded to December 2012, were at that stage still to report. This fourth bulletin now draws together the learning from the interim and final reports of all ten funded projects.

We highlighted in the third bulletin, and continue to stress, the importance which the Project Steering Group attaches to the demonstration of impact of shared services work, and to sustainability planning for all ten projects, so that lessons can be made available for the wider sector.

There will be a dissemination phase for the project, which is likely to include an internet-based bank of key documents and reports as a resource for providers in the local authority and third sectors who want to find new ways to work together in today's challenging environment – where on balance it does look as if providers see joint working as a way of helping them do more things with their money.

## **Summary of projects**

A read-across of reports generated to date suggests a clear shift in the more successful projects to new ways of working, which has required clear and firm strategic leadership; these have been focused on long-term gains. Project activity has borne out findings from the initial mapping exercise that adult learning providers tend not to engage in collaboration for money-saving purposes, but as a means of doing more with the same/doing the same with less.

A number of “deeper collaborations” seem to be in development, in many cases with farsighted plans and arrangements in place to secure sustainability.

### The Projects

There were eight Challenge fund projects, of which one had to withdraw due to the ill health of key worker, and two Pathfinder projects with more ambitious aims.

### What they wanted to achieve

The projects’ aims and objectives fell into two main categories, with considerable overlap.

The first type of aim involved seeking to produce a tangible new tool or facility through collaboration: for example the Reading-wide course guide and ‘app’ to provide better and more coordinated marketing and publicity across a geographical provider with several providers; the Virtual Learning Environment (VLE) and other online tools for Job Centre Plus (JCP) candidates in Redbridge’s ‘Action for Employment’, including an online Individual Employment and Learning Plan and employability resources to support learners actively seeking employment.

The second type of aim tended to involve research and development of collaborative activities to share specific services and functions such as Observation of Teaching and Learning (OTL) and other quality-related processes, staff development, management information services (MIS), shared posts, joint curriculum planning and development, etc with the aim of improving quality, efficiency and effectiveness and saving money where possible. Both the Pathfinder projects fell into this category, with the South West consortium bringing together local authority services, and VOLA linking third sector providers on Merseyside.

### **Interim findings**

The interim reports from the projects served to reinforce the issues which emerged from our original mapping exercise of partnership working in the local authority and third sectors: these were reported on in bulletin one. Key messages include:

- Meaningful partnership working takes time and involves the development of shared vision, culture, systems and operations.
- Real commitment is needed from the core members of any partnership for its work to be effective. Our projects show the importance of the driving force of a Co-ordinator, working to ensure adherence to an agreed action plan. The involvement of senior managers has in cases been key: “attendance by Heads of Service has been crucial in order that decisions can be made there and then”.

- Productive collaborations need clear trust, openness, honesty and transparency for anything to work.
- Excellent communication between services is a further key requirement.
- Shared services in a local authority setting are always going to be dependent on wider local authority activities. Conflicting work priorities of other teams, especially corporate services, can impact deleteriously on project timeframes.
- FE colleges appear to have difficulties in rationalising their priorities when engaging with collaborative working.
- Additional contingency time should be considered to account for situations and issues that arise within the different partner organisations, which have the effect of limiting the time available to spend on the project.
- Investment is needed at the outset of developing a shared service approach; any financial gains are likely to be achieved longer term.
- Several projects to a greater or lesser extent have found resistance amongst partners to the expectation that organisations would be willing to share resources: we suspect this to be a generic characteristic of this type of work.
- For organisations that operate across a wide geographic area, shared back room services may not be a viable option. Interestingly, both Pathfinders found little advantage to be gained in pooling administrative functions. Collective purchasing arrangements, in particular, have been found to expose the lead organisation to considerable (and possibly unacceptable) risk.

## **Final project findings**

### Enablers

There was much agreement among providers about what kinds of factors stimulated and supported success. The emphasis was placed on trust, openness and transparency as indispensable factors, as were time, careful planning and clarity of goals.

### Blockers

Factors reported as inhibiting success tended to vary across projects more than did the 'enablers', based on individual providers' circumstances. There was unanimity, however, that not having enough time was a serious problem.

### Project linkages

Projects all report having made links with other collaborations, and also with other contacts who could help them in respect of sharing services. A read-across of the final reports highlights networking and the sharing of best practice as key positive outcomes of the whole Shared Services initiatives, not only to benefit project activity itself, but also by creating the habit of referring to other providers for experience and best practice. Mentoring, peer supporting, review of materials and documentation, discussion and advice/information sharing were among the means by which projects linked with other like-minded providers.

## Outcomes

A wide range of outcomes and impacts were reported.

All projects reported broad success or partial success in their stated aims, and all mentioned improvements in relationships and working practices between partner providers. A minority of projects reported actual financial savings – these were present in just under half the projects.

Two participants received good feedback from Ofsted based on their Shared Services project practice. For example, the Ofsted inspection report on the Isles of Scilly (part of the Plymouth-led project) found that, in respect of the new OTL process “an innovative shared partnership has four different providers moderating a common approach to lesson observations, with routine, robust benchmarking discussions carried out using four-way online conferencing”.

All projects reported improvements in quality, in the learner experience and in service effectiveness.

## **Project impacts**

### Quality and other impacts for learners

All providers focused strongly in their reports on improvements from learners' point of view. This was achieved broadly through greater co-ordination of planning, which eliminated duplication, improved choice and widened the range of provision in a given geographical area; improving marketing and publicity, so it is easier for learners to see what is on offer; and increasing and improving progression opportunities and signposting learners to them. Several projects overtly focused on developing shared quality management approaches and monitoring systems, and outputs from these are now being used as a way of improving quality. Increased efficiency and effectiveness are being achieved by sharing common processes like OTL and SAR validation.

### Effectiveness

Projects report in less detail about specific ‘effectiveness impacts’, but this is possibly because they have included some measures of effectiveness within their reports on impacts relating to quality and the learner experience.

### Financial

In general, the projects report more incidences of financial savings than we had predicted. Financial impacts were less detailed and extensive than other reported impacts, but the reports indicated that financial considerations were far more taken into account than we had originally found in our preliminary mapping of collaborative activities. This suggests that for adult learning providers, being able to focus on collaboration in a concerted and planned way (rather than the ad

hoc sharing we reported on initially) is what has enabled providers to think about cost savings and efficiency gains.

### Sustainability

All projects reported that collaborative work will continue after the period funded under the Shared Services initiative, which is a strong testimony to the overall success of the scheme. Several projects report having obtained funding and other resources to continue and develop their collaborative activities; others have developed (and provided) partnership agreements indicating ongoing commitments to collaboration amongst partners, even where no specific resource allocation has yet been secured.

### **Key learning from the projects**

All the reports agree that in order for Shared Services to 'work', there has to be clear trust, openness, honesty and transparency. "What we learned from our project is that we have been able as a group of services to take the best from individual services to produce a coherent, informed and useful system of quality improvement." Some providers have changed their ways of working.

Key learning points on which there was broad agreement are:

- Building on existing partnerships  
Working with other providers where there is already a relationship and history of successful collaboration means the development of a shared service approach is less of a risk, and senior managers and Governors are more likely to commit. Work will proceed at a good pace as both organisations are familiar with each other's set-ups, and there is a mutual trust and swift decision taking.
- Infrastructure  
A successful shared service needs some infrastructure to support it. In the case of each of our projects a strategic steering group has ensured continuing focus on a shared vision, commitment of resources and achievement of objectives. Joint project management can act as an effective problem solving forum as and when issues arise.
- Investment may be necessary  
Developing a shared service approach may not necessarily save a provider money in the short term. An investment of staff time and additional funding may be needed to get a successful shared service off the ground. Savings are likely to be made over the longer term. However, the value added benefits for learners are likely to be significant, resulting both from the stimulus for research and development and from the sharing of expertise, which result in innovation and the adoption of good practice.

## Tools and documents produced

A considerable number of useful documents have been generated as a result of the projects, which could form the basis of a toolkit for others interested in exploring sharing of services. The HOLEX National Office team is in the process of assembling these materials so they are readily accessible; we expect to be able to publish the material on the internet after Easter 2013.

## Next steps

The Adult Learning Shared Services Steering Group has sanctioned three strands of continuation activity. We will, in the period to Easter 2013, be:

- revisiting the 40+ examples of informal collaboration we identified in our initial mapping exercise, to check on progress and to draw out further lessons which might be of use to the wider sector, including identification of further 'enablers' and 'blockers' to productive partnership working.
- working with London-based specialist designated institutions, each of which has a strong history of partnership working, to learn from their experience
- undertaking an assessment of the benefits to be gained from third sector consortium arrangements, and using this evidence to explore options for the development of new, formalised third sector partnership arrangements.

As a result, final reporting of our work to map, stimulate and monitor collaboration and the sharing of services in local authority and third sector settings will be undertaken in summer 2013. We will in the interim continue to report on emerging findings through further bulletins.

Membership of the Adult Learning Shared Services Steering Group comprises Tim Ward (Chair), from the Third Sector National Learning Alliance ([tim@learningcurve.org.uk](mailto:tim@learningcurve.org.uk)); Christine Doubleday from 157 Group ([christine.doubleday@157group.co.uk](mailto:christine.doubleday@157group.co.uk)); Ian Yarroll from NIACE ([ian.yarroll@niace.org.uk](mailto:ian.yarroll@niace.org.uk)); and Bob Powell from HOLEX ([holexpb@aol.com](mailto:holexpb@aol.com)). Research activity, project co-ordination and Steering Group support is provided by Miranda Seymour-Smith, working through the HOLEX National Office.

If you would like further information on the Adult Learning Shared Services programme, or wish to notify us of collaborative work you already have underway or are planning, please contact the HOLEX National Office in the first instance: e-mail [holexpb@aol.com](mailto:holexpb@aol.com) or telephone 01386 443550.