

## **SPECIFICATION FOR A CONTRACTOR TO MANAGE THE IMPLEMENTATION OF THE REVENUES AND BENEFITS SHARED SERVICE PARTNERSHIP BETWEEN HARLOW AND UTTLESFORD COUNCIL.**

### **Background**

In July 2010, Harlow District Council (HDC) and Uttlesford District Council (UDC) jointly commissioned a feasibility study to explore the opportunities and risks associated with the two Councils entering into a shared service partnership for the Revenues and Benefits service.

The feasibility study was undertaken by John Layton Associates (JLA), the Executive Summary of which is shown as Appendix A. Following publication of the JLA report, both Councils agreed, in principle, to enter into a partnership and to take steps, over a 2 year period to fully integrate the services into a single, shared services partnership. The Councils also agreed to set up a Joint Committee to take this forward. These decisions were taken at full Council meetings of UDC and HDC on 19 October 2010 and 4 November 2010 respectively. The respective reports and resolutions, including the terms of reference for the Joint Committee, can be found by accessing these links.

### ***Insert links***

Achieving a shared service is a complex project with many variables and issues to consider. The two Councils want to identify and fully understand these variables and issues before finally deciding to proceed to the creation of the shared service. The two Councils are now seeking the project management expertise to identify the variables and issues that need to be considered and to provide options for the resolution of any challenges that need to be overcome.

Neither Council currently has the necessary capacity to project manage a project of this size and complexity. We are therefore inviting bidders to submit tenders for project managing the two phases to the transition to a shared services partnership.

### **The Role**

We are seeking a suitable individual/organisation to oversee and carry out a detailed project management function for the two phases leading to the implementation of a shared service partnership. It should be noted that phase two will be contingent upon each Council formally resolving to move to phase two having considered the outputs from phase one.

The key, high level, tasks for the project may be summarised as follows:

#### **Phase 1**

- a) To reevaluate, in detail, the options for the provision of a shared service along with the costs and savings identified in the JLA report; including formulating

detailed budgets for the options for the achievement of a shared services partnership.

- b) To develop an outline and costed project plans for the options for the achievement of a shared service arising out of (a) above.
- c) To develop an effective performance management framework, including agreement of a suite of performance indicators, for practical implementation both during and after the full transition to a shared services partnership.
- d) To undertake a procurement exercise for the use of suitable ICT, telephony, website and forms package including, where necessary but not restricted to, the development of a specification, procurement methodology, OJEU notices, assessment of tenders, preparing of reports recommending a suitable supplier and a transition plan for the chosen system in accordance with the Council's Contracts Standing Orders Relating to Contracts.

## Phase 2

- e) To develop and implement a detailed and comprehensive project plan for the implementation of the chosen option for a shared services partnership.

Additionally for both phases of the project the project manager will:

- f) Act as the day to day lead for supporting the Joint Committee fulfil its role as per its approved terms of reference.
- g) Produce high quality reports for Council meetings, the Joint Committee, any other Committee and the Corporate Management Teams of the two Councils in respect of any aspect of the shared services partnership.
- h) Work closely with the Strategic/Corporate Directors and the Joint Revenues and Benefits Manager (to be appointed) to ensure transition to a fully integrated partnership.
- i) Co-ordinate and manage multidisciplinary teams working to ensure successful implementation of the partnership.
- j) In accordance with the Council's Human Resources policies lead the development of, and lead/support the implementation of (depending upon the appointment of the relevant manager), a unified staffing structure for the shared services partnership and oversee the TUPE transfer and appointment of relevant staff as well as redundancies, if any, that may occur.

## Requirements

The individual/organisation appointed must have the following essential requirements:

- a) Proven leadership skills.
- b) Formal project management qualification such as Prince 2 or PMP.

- c) Experience of managing significant change management projects to tight timescales and budgets, especially the creation of a single shared services partnership between two or more Councils.
- d) Ability to design and implement strategies and service delivery plans, including associated detailed and costed project management plans.
- e) Experience of providing high quality advice and presenting complex information to Councillors and senior managers.
- f) Experience of managing multidisciplinary teams.
- g) Ability to negotiate and manage risks.

A knowledge of revenues and benefits services would be advantageous as would a knowledge of current Government proposals in relation to these services.

### **Evaluation Methodology**

Bidders are required to submit evidence in support of the above requirements. The following information is also required.

- a) CVs of proposed personnel to be assigned to undertake the role, including a short summary (no longer than 1 page) summarising their suitability.
- b) References from clients in connection with work of a similar nature undertaken elsewhere.
- c) Methodology Statement (a note describing the approach that could be adopted to successfully accomplish the project. If more than one option is being quoted then a methodology statement for each option will be required).
- d) Any specialist skills or access to such skills at short notice
- e) A note outlining how any unforeseen absences with regard to personnel assigned to this project will be dealt with.
- f) Price (we would request quotations on the basis of a variable price (daily rates), or combination of fixed and variable price and/or sharing of cost reductions actually achieved above a threshold inclusive of expenses and disbursement).
- g) How the bidders will deal with a two phase project and what they anticipate the resource, activity and timescale requirements to be for each phase.

We anticipate that the project will require a suitable individual to work with both Councils on a part time basis. As with many projects this will vary depending upon the project progress. Bidders are requested to provide their best estimates of project manager time requirements and their view of the duration of the project.

We will evaluate bids on the basis of 60% quality, 40% cost.

### **Resources to be made available**

Harlow Council will make available secretarial support through its Governance team.

## **JOINT PARTNERSHIP COMMITTEE 17 JANUARY 2011**

Officers of both Councils will work under the direct day to day management of the appointed bidder. In addition to the Joint Revenues and Benefits Manager, this will include other staff from the Revenues and Benefits service, Human Resources, Legal, ICT and Finance. Where necessary, the Council will 'back fill' posts that are 'lost' to support the shared services partnership.

### **Timescale**

As outlined above, a two year transition period has been identified to ensure a smooth transition to a shared service. The partnership is expected to come fully into operation from 1 April 2013.

### **Accountability and Reporting lines**

The suitable contractor will be accountable to the Strategic (or Corporate Director) of Harlow and Uttlesford Council, namely Sunil Modaley and Adrian Webb respectively.

Day to day responsibility for all ICT related areas will be to Adrian Webb and in his absence, e.g. due to holiday, to Sunil Modaley.

Day to day responsibility will be to Sunil Modaley and in his absence, e.g. due to holiday, to Adrian Ward.

### **Office base**

The successful bidder will be expected to work from the Civic Centre, Water Gardens, Harlow. A dedicated office will be provided with appropriate ICT and other facilities.

Regular travel and work from the Council offices of Uttlesford Council, based in Saffron Walden, will also be necessary until such time as the staff are relocated. .

### **Contacts**

We request that bids are returned by 12:00 noon on Monday, (To be inserted) and addressed in a sealed envelope, to:

Mrs T McDermott,  
Contract Manager  
Harlow Council,  
Civic Centre,  
Water Gardens,  
Harlow  
CM20 1WG

Any queries should be addressed to Tina McDermott or Sunil Modaley on 01279 446099.

