

Cheshire West & Chester Council delivers £1m+ savings with our Collaborative Planning solution

Budget-holders are able to confidently create and monitor their own forecasts and spending, reducing the burden on the Finance team.



Cheshire West and Chester Council serves a population of 329,500 across an area of 350 square miles. The borough is located in the north-west of England and includes the historic city of Chester and the industrial and market towns including Ellesmere Port, Frodsham and Northwich, as well as rural areas which account for about a third of residents.

Like other local authorities Cheshire West and Chester Council is subject to severe budget pressures as part of Government austerity measures and is continuously striving to deliver more with less. To do this while simultaneously maintaining and improving the quality of frontline services, the Council is following a policy of strategic digitisation and automation of underlying business processes.

As well as far exceeding its savings targets, the Council has recently transformed its financial operations by empowering departmental managers to take greater ownership of their budgets and spending. The organisation has achieved this by implementing Collaborative Planning, our budgeting and forecasting solution.

£1m savings and even more to play for

Cheshire West and Chester originally earmarked savings of £500,000 over three years through the closer cost-control enabled by Collaborative Planning. The impact of the project has thus far exceeded the Council's initial savings targets of £500,000.

The scale of transformation enabled by our Collaborative Planning solution, has resulted in Cheshire West & Chester Council being shortlisted for a prestigious "Transformation Through IT" award from the local government Municipal Journal.

Charlotte Wynn, Finance Manager within the Council's Finance Department says, "On the back of the system we have completely restructured and transformed our Finance service, and delivered £1 million in savings. On top of that we anticipate additional savings because Collaborative Planning allows budgets to be managed more closely, which encourages querying of spending."

"Miscoding, double counting and other human errors associated with manual data input and an over-reliance on spreadsheets have been eliminated now and, with a single system, it's easier to spot

Client >

Cheshire West & Chester Council

Sector >

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Project >

Financial operation transformation project

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issues. Integrating all the data can be done at the touch of a button now, which reduced our reporting cycle by a week. The whole process is a lot better now that there is a single version of the truth, which everyone has access to."

Continues Wynn.

Crucially this has led to the desired changes in behaviour among budget-holders.

Wynn says, "Managers understand the system and put in their own forecasts and serve themselves a lot more. This frees up our own time to focus on scrutinising and challenging costs, adding more value to the role of Finance. We couldn't do this when we were bogged down with day-to-day tasks. The Collaborative Planning solution has improved financial management right across the Council."

Seeking greater cost control

Collaborative Planning provides clear visibility and easily digestible forecasts and expenditure analyses, so departments can monitor their own spending and take proactive steps to keep budgets on track.

The initial driver for the project came when four neighbouring councils were merged to form the current authority. As the different operations were amalgamated, the support functions needed to find an efficient way to standardise processes and deliver new levels of efficiency to the combined organisation. A key priority for the consolidated Finance team was to increase productivity and provide tighter controls around spending.

Reducing risk

Before deploying Collaborative Planning, finance managers had to manually integrate multiple Oracle modules to perform monthly number-crunching and reports, a process that could take up to three weeks. As well as being very slow and labour-intensive, the manual tasks carried a risk of errors so the figures were not 100% reliable. They didn't provide a holistic picture either, or enable timely monitoring of spending against budget allowances.

Wynn continues, "Before we implemented Collaborative Planning, everyone was too reliant on Finance to understand the figures. Forecasts were

all done on spreadsheets and we had to produce a large number of these each month, bespoke to the needs of individual budget-holders. This was very time-consuming, and there was a lack of consistency in how the forecasts were constructed. There was no focus on risk either. With a brief to make significant savings, we needed to create a more conscious manager by giving budget-holders a clearer understanding of their projections and spending."

Ease of use empowers budget-holders

The Council selected Collaborative Planning after a thorough evaluation of the market. We already had a strong track record of working with local authorities, and offered the budget monitoring and forecasting capabilities it needed. It also provided a direct interface into Oracle, streamlining the consolidation of data feeds into the system. The software also had the flexibility Cheshire West & Chester Council required and was very user-friendly, maximising the likelihood of positive take-up by budget-holders.

We were able to meet strict time pressures that the Council faced. A live system was tested and ready by January 2012, allowing Cheshire West & Chester to begin a phased roll-out starting with elements of the Finance department. Since then the software has been extended to the whole department and more than 380 budget-holders across the Council. *"These users have defined roles and responsibilities; they could be forecasters, approvers or heads of service," Wynn notes.*

Capital control

Most recently Cheshire West & Chester Council has extended use of the software to 40 capital budget managers.

"Often, with capital schemes which could span several years it isn't until the end of the year that under or overspending is identified, so we are using the Collaborative Planning solution to help produce budgets and improve transparency here too".

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*Charlotte Wynn >
Finance Manager >
Cheshire West & Chester
Council*

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In future, the Council plans to further use the Advanced system to enable new ways of working. "We feel Collaborative Planning will translate well into shared service, partner or staff mutual scenarios," Wynn continues.

The organisation will find out whether it has won at a formal presentation in June.

"There is no doubt in our minds that we have met the brief with everything we have achieved,"
Wynn concludes.

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Charlotte Wynn >
Finance Manager >
Cheshire West & Chester
Council

More information

w oneadvanced.com
t +44(0) 8451 605 555
e hello@oneadvanced.com

Ditton Park, Riding Court Road, Datchet, SL3 9LL

Advanced Computer Software Group Limited is a company registered in England and Wales under company number 05965280, whose registered office is Ditton Park, Riding Court Road, Datchet, SL3 9LL. A full list of its trading subsidiaries is available at www.oneadvanced.com/legal-privacy.