

Section 07

Toolkit



AMPLIFY SHARED SERVICES DECISION TOOLKIT

User Guide

An evidence-informed self-assessment and economic modelling tool for patient organisations, collaborations, networks, funders and sector bodies.

The toolkit does not assume that shared services are desirable. It is designed to identify where sharing may improve efficiency or capability, where a hybrid or collective procurement model may be preferable, and when an organisation should retain a function locally or not proceed.

1. What the toolkit does

The workbook allows an individual organisation or a collaboration to assess seven operational functions: IT support, cybersecurity, CRM/data infrastructure, finance administration, HR administration, reporting, and software procurement.

Output	What it tells you
Actual cash impact	Whether the proposed shared service costs more or less than the organisation currently pays in cash.
Equivalent Capability Value (ECV)	Whether comparable capability is cheaper to obtain collectively than independently.
Released Organisational Capacity (ROC)	How many internal administrative hours may be released.
Capability uplift	Whether the shared model lifts a function from absent/ad hoc capability toward a functional minimum.
Avoided Duplication Index (ADI)	How much replicated infrastructure is consolidated.
Shared Services Suitability Index (SSI)	A combined function-level score using economics, capability need, shareability, readiness and duplication.
3-/5-year ROI and payback	Whether the shared-service investment is economically attractive after implementation costs.

Possible decisions

Decision	Meaning
SHARE	Strong economic and operational case for shared provision.
HYBRID	Share infrastructure or expertise but retain organisation-specific delivery/ownership.
COLLECTIVELY PROCURE	Use common specifications or purchasing but retain separate service provision.
IMPROVE LOCALLY	A capability gap exists, but a shared service is unlikely to be the best response.
RETAIN LOCALLY	The function is better kept organisation-owned, often because it is relational or already efficient.

Decision	Meaning
DO NOT PROCEED	Critical governance, privacy/data or exit risks outweigh the potential benefit.
INPUT REQUIRED	The economic model is incomplete; shared-service cost assumptions must be entered.

2. Core principles

- Shared services are a means, not an objective.
- Low expenditure does not necessarily mean efficiency; it may indicate unmet capability.
- Cash savings and capability uplift are different forms of value and should be reported separately.
- Relationship-intensive functions should generally remain close to communities.
- Organisations should retain appropriate ownership, control and practical exit rights.
- A shared service should reduce administrative burden rather than create another layer of it.

3. Workbook sequence

Step	Worksheet	Action
1	Organisation Profile	Enter organisation size, country, cohort size and hourly values.
2	Capability	Score current and target capability for each function.
3	Shareability	Score duplication and the inherent shareability of each function.
4	Readiness	Assess governance, trust, data, privacy, standardisation, migration, provider sustainability and exit.
5	Economic Model	Enter current costs/hours and the proposed shared-service fixed, variable and residual local costs.
6	Dashboard	Review the automated recommendations and economic/capability outputs.
7	Collaboration	Aggregate multiple organisations and assess how common the requirements are.

4. Completing the Organisation Profile

Yellow cells are editable inputs. The country selection drives the central 2026 equivalent-capability benchmark used in the economic model. These benchmarks are model inputs rather than procurement quotes and should be replaced with local quotes when a real implementation decision is being made.

The cohort size is important because shared fixed costs and the ADI are calculated across participating organisations. The implementation-cost percentage is initially set at 50% of one year of shared operating cost as a transparent central scenario; it can be changed for sensitivity testing.

Hourly values

Enter a reasonable hourly economic value for paid staff and executive time. Volunteer time is optional. Enter zero if the organisation prefers not to monetise volunteer contribution. The workbook always keeps cash cost and full organisational resource cost separate.

5. Capability assessment

Each function is scored from 0 to 5. The aim is not to maximise every function to 5. For many small organisations, a reliable level 3 capability is an appropriate minimum.

Score	Interpretation
0	Capability absent.
1	Informal, ad hoc, person-dependent or reactive.
2	Basic capability exists but with significant gaps.
3	Functional minimum appropriate to the organisation.
4	Strong, professional and dependable.
5	Mature, integrated and continuously improved.

The workbook calculates Capability Uplift = Target Capability – Current Capability, and Capability Need as the proportion of the five-point scale still unavailable. Capability need contributes 25% of the SSI.

6. Duplication and shareability

Duplication

Five questions are scored 0–2: whether multiple organisations need the same function, fixed systems are recreated, expertise is repurchased, similar data/reporting is repeated, and tools overlap. The maximum Duplication Score is 10.

Raw score	Interpretation
0–2	Low duplication
3–5	Moderate duplication
6–8	High duplication
9–10	Very high duplication

Shareability

Seven criteria are scored 0–2: standardisability, specialist expertise, fixed costs, economies of scale, separability from relationships, limited customisation and governability through service standards. The maximum Shareability Score is 14.

Raw score	Interpretation
11–14	Strong shared-service candidate
8–10	Hybrid/shared-support candidate
5–7	Selective collaboration or collective procurement
0–4	Usually retain locally

7. Readiness and red flags

A strong economic case is not sufficient if the collaboration is not ready. Each function is rated Green, Amber or Red for eight readiness domains.

Domain	What to test
Governance	Are responsibility, accountability and decision rights clear?
Trust	Are organisations willing to depend on the provider/collaboration?
Data ownership	Are ownership, access and control unambiguous?
Privacy/security	Can applicable privacy and security requirements be met?
Standardisation	Are requirements sufficiently common?
Migration capacity	Can organisations realistically transition?
Provider sustainability	Is the shared service itself viable?
Exit/portability	Can an organisation leave with its data and continue operating?

Critical override rule: a Red rating for Governance, Data Ownership, Privacy/Security or Exit/Portability overrides the numerical SSI and produces DO NOT PROCEED.

8. Economic model

For each function, enter current cash expenditure, internal paid/executive/volunteer hours, the proposed shared fixed cost, shared variable cost per organisation, residual local cost, expected shared internal hours and the number of shared infrastructure instances.

Key measures

Current cash cost: Direct/software expenditure + external provider expenditure. What the organisation actually pays.

Full organisational resource cost: Cash cost + paid staff time + executive time + optional volunteer shadow value. Captures the economic burden of internal administration.

Annual shared cost per organisation: Shared fixed cost ÷ cohort size + shared variable cost + residual local cost. The annual organisation-level cost under the proposed shared model.

Actual cash impact: Current cash cost – shared annual cost. Positive means lower cash expenditure; negative means the organisation pays more.

Equivalent Capability Value: Equivalent independent benchmark – shared annual cost. Measures the value of obtaining comparable capability collectively.

ROC: Current internal hours – shared internal hours. Reports released organisational capacity in hours/year.

ADI: 1 – shared instances ÷ current independent instances. Measures structural duplication removed, not workload removed.

ROI and payback

The workbook calculates equivalent-capability ROI using implementation cost plus recurring shared-service cost:

3-year ROI = $[(3 \times \text{equivalent capability cost}) - (3 \times \text{shared annual cost} + \text{implementation cost})] \div (3 \times \text{shared annual cost} + \text{implementation cost})$

5-year ROI uses the same structure over five years. Payback months = $\text{implementation cost} \div \text{annual ECV} \times 12$.

These are equivalent-capability investment measures. They are not the same as cash ROI unless the organisation is currently purchasing equivalent capability.

9. Shared Services Suitability Index (SSI)

The dashboard combines five dimensions:

Dimension	Weight
Economic attractiveness	30%
Capability need	25%
Shareability	20%
Readiness	15%
Duplication	10%

$SSI = 0.30(E) + 0.25(C) + 0.20(S) + 0.15(R) + 0.10(D)$

SSI	Automated interpretation
75–100	SHARE
55–74	HYBRID
35–54	COLLECTIVELY PROCURE
<35	RETAIN LOCALLY

The recommendation is intentionally function-specific. An organisation may share cybersecurity, use a hybrid CRM model, collectively procure IT, and retain advocacy/communications locally. The SSI weights and decision thresholds are decision-support assumptions rather than empirically validated cut-offs and should be tested during piloting.

10. When shared services may not be right

The function is highly relational: Patient support, peer support, advocacy voice, community mobilisation and condition-specific communications can lose value when centralised.

Existing capability is already efficient: Migration and disruption may exceed the benefit.

The local market is already inexpensive: Collective procurement or vendor management may be superior to building a new shared provider.

Requirements differ too much: Heavy customisation can eliminate scale economies.

Data governance is unacceptable: If ownership, segregation, privacy, portability or deletion cannot be guaranteed, do not proceed.

Exit is impractical: A collaboration that creates effective lock-in carries unacceptable risk.

Governance becomes bureaucratic: The shared service should not create extra committees, approvals or reporting that recreate the original burden.

There is insufficient scale: The economic model should determine break-even rather than assuming it.

11. Using the Collaboration worksheet

Each participating organisation can complete its own toolkit and transfer the headline outputs into the Collaboration worksheet. The sheet aggregates current cash cost, shared cost, ECV, ROC and red flags. The Common Requirements % should then be completed for each function. This tests whether a common solution is actually feasible.

Commonality	Interpretation
80–100%	Highly common – common solution may be appropriate.
60–79%	Common platform with configuration.
40–59%	Hybrid or selective sharing.
<40%	Usually retain or procure separately.

Modular participation is preferable to an all-or-nothing model. A collaboration can share CRM/data and reporting while allowing members to keep their own finance or IT provider.

12. Interpreting value fairly

The toolkit deliberately separates cash savings from capability uplift. This is essential for equity. A very small or volunteer-led organisation may currently spend little on cybersecurity, CRM administration or professional HR because it cannot afford those functions. A shared service can therefore increase its cash expenditure while still providing substantial economic and organisational value.

Released Organisational Capacity should be reported as hours made available for redeployment according to organisational priorities. Do not automatically describe every released hour as an additional patient-facing hour.

13. Practical decision rule

A shared service is strongest when all four conditions are present:

- A meaningful economic or capability benefit is identified.
- The function is intrinsically shareable and requirements are sufficiently common.
- The participating organisations are ready to share it.
- No critical governance, data, privacy/security or exit red flag remains.

Where one of these conditions is missing, the preferred outcome may be hybrid delivery, collective procurement, local improvement or retaining the function independently.

14. Benchmark and model limitations

The country benchmark sheet contains central 2026 market-cost inputs developed for Australia, the United States, United Kingdom, India, Brazil and South Africa. They are intended for scenario modelling, not as supplier quotations. Local market conditions, nonprofit discounts, taxation, regulatory requirements, exchange rates and organisation complexity can materially change costs. Brazilian HR, CRM implementation and reporting inputs

have lower confidence than several other country benchmarks and should be replaced with local quotations before investment decisions. The workbook is a decision-support tool. It does not replace legal, accounting, privacy, employment, cybersecurity or governance advice.

15. Recommended final output

For external reporting, use the Dashboard and summarise the decision in plain language: what should be shared, what should remain local, why, the economic/capability result, any red flags, and the conditions that must be met before implementation.

Appendix A. Recommended module structure

Module	Typical components
A. Digital foundation	IT standards, cyber, cloud, technical support/vendor management.
B. CRM & data	CRM platform, governance, integrations, dashboards and reporting data.
C. Finance	Bookkeeping, payroll processing, finance systems and standard reporting.
D. People	HR administration, volunteer systems, policy and specialist support.
E. Reporting & evidence	Grant reporting, dashboards, impact/evaluation infrastructure.
F. Procurement	Software eligibility, licences, renewals, vendor management and rationalisation.

Appendix B. Critical distinction

A low-spending organisation is not necessarily efficient. It may be under-resourced. The toolkit therefore reports both Actual Cash Impact and Equivalent Capability Value so that capability-building is not incorrectly described as a cash saving.