SHARED SERVICES FEASIBILITY STUDY

**APPLICATION FORM**

**FROM**

***Board***

***Board***

***Board***

***Organization***

***[Insert additional boards/organizations as needed]***

**TO THE**

**Effectiveness and Efficiency (E&E) Advisory Committee, Council of Senior Business Officials**

**Date of Submission:** Click here to enter a date.

**This template should be used for developing and submitting applications for support through the Council of School Business Officials (COSBO) Effectiveness and Efficiency (E&E) Fund for a Shared Services Feasibility Study. Applicants who wish to apply for funding to support the implementation of a shared services initiative may complete a separate application form *- Shared Services Project Implementation.***

**Background and Instructions**

Since 2006, the Ministry of Education has provided funding to study, develop and promote initiatives that would support effective and efficient utilization of financial and non-financial resources, and strengthen management capacity in the sector. The Ministry continuously provides project management support and leadership for E&E projects.

The Ministry will be supporting shared services models that increase collaboration among school boards and/or public sector partners by streamlining administrative functions or processes.  The objective is to increase efficiencies, enhance service or realize economies of scale to enable school boards to focus their resources on the core mandate of student achievement.  Examples may include, but are not limited to, work order systems; custodial and school maintenance services; capital planning; energy management; payroll; server hosting; procurement; travel and expense management; and recruitment.

In April 2015 in Memorandum SB13, the Ministry announced seed funding from the COSBO E&E funding allocation to support feasibility studies and/or to establish local and regional shared service initiatives to deliver select operational services.

This one-time seed funding will support initiatives beginning in the 2015-16 school year and is capped at:

* 50% of the cost of a feasibility study up to a maximum of $25,000 per study;
* Up to a maximum of $100,000 per initiative for implementation of a shared service initiative but not to exceed 50% of total project costs.

This funding must be used only for the purpose of supporting the completion of a feasibility study or the implementation of a new shared service initiative. Successful applicants may not use the funds to cover any specific cost that has or will be funded or reimbursed by any third party, including other ministries, agencies and organizations of the Government of Ontario.

All proposals will be evaluated by the Effectiveness and Efficiency (E&E) Advisory Committee, COSBO. This Committee is part of the Ontario Association of School Board Officials (OASBO) and is comprised of Senior Business Officials from across the province and representative of Public, Separate, English and French school boards.

Applicants acknowledge that any board employee may be excluded from evaluation of proposals to address any actual or potential conflict of interest.

Specific instructions for school boards completing this application:

* Applications must be received by the E&E Advisory Committee by September 30, 2015.
* Applicants will receive one-time seed funding only for a shared service feasibility study. The application should not be intended to fill gaps in project funding, or provide an alternative stream of ongoing funding. Applicants must follow all the applicable government policies and procedures including the *Broader Public Sector (BPS) Accountability Act*.
* Applications must include more than one school board and may include other partners such as: designated broader public sector organizations and publicly funded organizations as defined under the *BPS Accountability Act*, a board of health, transportation consortia, a municipality or First Nations.
* Applicants should have reviewed the 2011 report - [*A Shared Services Feasibility Study Based on Eleven Eastern Ontario School Boards*](https://sbsb.edu.gov.on.ca/VDIR1/COSBO/EEProjects.aspx?Link=COSBO) and also researched current sector initiatives or models in Ontario and other jurisdictions related to the shared service area the proposal is examining.
* The completed submission must be signed by the Senior Business Official for all boards identified in the application and the equivalent of any public sector partners or his/her designates for all boards identified in the application.
* Applicants must agree to share the Feasibility Study with the Ministry of Education and share results and findings with the education sector. Applicants may be asked to present and share their experiences with the education sector following completion of their initiative.

***Please send completed applications to Dean Currie, COSBO E&E Committee Co-ordinator, at*** [***dean@cmac-group.com***](mailto:dean@cmac-group.com) ***and Cheri Hayward, Director, School Business Support Branch, at Ministry of Education at*** [***cheri.hayward@ontario.ca***](mailto:cheri.hayward@ontario.ca)***. Applications must be received by September 30, 2015. Successful applicants will be notified in October 2015.***

**A: School Board/Public Sector Organization Information**

|  |  |
| --- | --- |
| **Lead School Board Name** | Click here to enter text. |
| **Feasibility Study Name** | Click here to enter text. |
| **Feasibility Study Contact** | Click here to enter text. |
| **Title** | Click here to enter text. |
| **E-mail** | Click here to enter text. |
| **Telephone** | Click here to enter text. |
| **Address** | Click here to enter text. |
| **Website** | Click here to enter text. |

|  |  |
| --- | --- |
| **Partner School Board or Public Sector Organization Name** | Click here to enter text. |
| **Contact** | Click here to enter text. |
| **Title** | Click here to enter text. |
| **E-mail** | Click here to enter text. |
| **Telephone** | Click here to enter text. |
| **Address** | Click here to enter text. |
| **Website** | Click here to enter text. |

***[Insert additional tables for additional boards/public sector partners in the feasibility study]***

### Proposal for Shared Services Feasibility Study:

|  |
| --- |
| ***Feasibility Study Name:*** Click here to enter text.  ***School Board Lead:*** Click here to enter text.  ***School Board/Partner Organizations:*** Click here to enter text. |

|  |  |  |
| --- | --- | --- |
|  | **YES** | **NO** |
| **Are all school board/partner approvals in place to move ahead with the feasibility study?**  Click here to enter text.  ***Note: Responses may include letters of support from partners*** | ☐ | ☐ |
| **A copy of the proposed budget is attached**  Click here to enter text. | ☐ | ☐ |

|  |
| --- |
| **Key Questions** |
| **What is the shared service opportunity that will be examined through the proposed feasibility study?**  Click here to enter text. |
| **How is the service, which is being examined through the feasibility study, currently delivered by the boards/partners?**  Click here to enter text. |
| **What are the goals and objectives of the feasibility study?**  Click here to enter text. |
| **Why are the boards/partners proposing to move forward with this feasibility study at this time?**  Click here to enter text. |
| **Are you proposing to do the feasibility study internally or using outside expertise?**  Click here to enter text. |
| **How long do you expect the feasibility study will take?**  Click here to enter text. |

This submission has been developed and approved by the following school board/public sector representatives:

SENIOR BUSINESSS OFFICIAL, BOARD Date

SENIOR BUSINESSS OFFICIAL, BOARD Date

SENIOR BUSINESSS OFFICIAL, BOARD Date

CEO/CFO, Public Sector Organization Date

CEO/CFO, Public Sector Organization Date

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