SHARED SERVICES PROJECT IMPLEMENTATION

**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 the implementation of a Shared Services Project. Applicants who wish to apply for funding to support a shared services feasibility study should complete a separate application form *– Shared Services Feasibility Study.***

**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 will be provided 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 shared service initiatives. The application should not be intended to fill gaps in program funding, or provide an alternative stream of funding for an existing business model or for ongoing funding. Applicants must follow all the applicable government policies and procedures including the [*Broader Public Sector (BPS) Accountability Act*](http://www.ontario.ca/laws/statute/10b25).
* 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.
* Applicants are encouraged to attach a business case for the initiative. If the template questions are addressed in the business case, please insert a reference to the appropriate section/page number (e.g. See business case pgs…)
* Applicants must agree to report back to the Ministry of Education and E&E Advisory Committee to share results and lessons learned with the education sector. A reporting template will be provided by the Ministry. If the initiative spans multiple years, the school board may be asked to provide an annual report back.
* Applicants may be asked to present and share their experiences with the education sector following completion of their initiative.
* Applications should identify the benefits of moving forward with the initiative and the expected outcomes.
* The completed submission must be signed by the Director of Education or his/her designates for all boards identified in the application and the CEO/CAO of any public sector partners or his/her designates for all boards identified in the application.

***Please send completed applications to Dean Currie, COSBO E&E Committee Co-ordinator, at*** ***dean@cmac-group.com*** ***and Cheri Hayward, Director, School Business Support Branch, at Ministry of Education at*** ***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. |
| **Project Name** | Click here to enter text. |
| **Project 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. |
| **Project 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 involved in the initiative]***

### Proposal for the Implementation of a Shared Services Project

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

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| --- | --- | --- |
| **Key Questions**  | **YES** | **NO** |
| **Are all school board/partner approvals in place to move ahead with the initiative?** Click here to enter text.***Note: Responses may include letters of support from partners*** |[ ] [ ]
| **Has the proposed initiative been reviewed by legal counsel?**Click here to enter text. |[ ] [ ]

| **Project Overview** |
| --- |
| **Your proposal is for a:****Pilot Project** [ ] **Long-term Initiative** [ ]  |
| **Please provide a brief description of your project.**Click here to enter text. |
| **Please provide the business rationale for your shared services project including the cost-benefit and financial analysis, benefits and outcomes, any research or resources used to support your project. If a business case has been developed, please attach it.** Click here to enter text. |
| **How is the service, which is being proposed as part of the shared services initiative, currently delivered by the boards/partners?**Click here to enter text. |
| **Why are the boards/partners proposing to move forward with this project at this time?**Click here to enter text. |
| **What has been done to date in preparation for this project?**Click here to enter text. |

| **Budget** |
| --- |
| **What is the total budget for the project? Please attach a detailed budget.**Click here to enter text. |
| **How will the seed funding be used to support this project?**Click here to enter text. |
| **Who will assume responsibility for administrative oversight of the project and the management of the seed funding?**Click here to enter text. |

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| --- |
| **Project Implementation**  |
| **Please provide details on project implementation including: project timeframe, roles and responsibilities, governance structure, resources required to manage the project (i.e. internal or with external support), etc. If an implementation plan has been developed, please attach it.**Click here to enter text. |

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

DIRECTOR, BOARD Date

DIRECTOR, BOARD Date

DIRECTOR, BOARD Date

CEO/CAO, Public Sector Organization Date

CEO/CAO, Public Sector Organization Date

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