Appendix A: Progress on Shared Services Review Recommendations

Rec.	No.	PHASE 1 - Activities	Comment
1a	1	Streamline the following paper-based processes: timesheets, attendance management, expense reimbursement, purchase requisitions, new employee/volunteer/student enrollment	**In-progress.** MLHU now using SharePoint Intranet software which facilitates process automation. Mileage submissions are now automated, with other processes in development.
1b	9	Investigate overhead cost-sharing with the Travel Clinic physicians	**Completed** and submitted as part of the 2013 PBMA process.
	10	Investigate revenue-generating opportunities from providing fit-testing to health service providers and students	**Completed**. Public fit-testing service currently offered as a 1-year pilot. Service on track to be profitable within 1-year timeframe. CERV volunteers are assisting and staff hours have been increased to accommodate bookings.
	11	Investigate revenue-generating opportunities for MLHU to charge speaker-fees	**Completed**. No opportunities available at this time.
	14	Integrate and align planning and budgeting activities (incl. clarification of roles, communication of expectations from all parties involved, and discussion of ongoing collaborative support)	**Completed**. Successful PBMA process completed in 2013 for the 2014 budget. Over $1M reallocated toward higher impact services. Planning is underway for 2015.
2c	17	Update expense, travel, mileage, catering, and procurement policies to ensure they are in accordance with best practices and support effective control and monitoring of costs. Communicate key points and/or notable changes to staff and educate Managers regarding enforcement expectations and accountabilities	**Completed**. Policies reviewed by PwC, MLHU Staff and Board of Health, then implemented. Managers and staff now being educated on policy changes. Education to be completed by Q4.
3a	21	Develop clearly-defined, measurable, outcomes–focused internal key performance indicators (KPIs) that provide meaningful direction for desired operational improvement which focus efforts on the efficiency and effectiveness of operations	**In-progress.** All teams required to provide list of PIs as part of 2014 operational planning. Balanced scorecard with organization KPIs being developed as part of strategic planning. Now focusing on developing team-specific KPIs as part of 2015 operational planning process.

Rec.	No.	PHASE 2 - Activities	Comment
1a	3	Investigate software to automate/manage attendance management	**In-progress** as part of activity #1 (in phase 1).
	4	Investigate software to automate/monitor staff learning/development activities (incl. resume tracking, certification)	**In-progress**. Has been developed for MLHU specific training and will be expanded to all staff development activities.
	5	Investigate software to automate/manage critical incidents	**In-progress** as part of activity #1 (in phase 1).
1b	6	Reduce bulk inventory and storage requirements	**Completed -** Offsite storage reduced by 200 ft^2.
	7	Reduce amount of offsite records storage	**In-progress**. Focusing on highest volume records: immunization consent forms.
	8	Revive Facilities Committee to examine space requirements and determine if MLHU can reduce its footprint	**In-progress.** Working with external consultant to examine space requirements.

Rec.	No.	Activities	Comment
	12	Investigate revenue-generating opportunities for charging private organizations for Emergency Plan review	**Investigation Complete.** No opportunities at this time.
2a	13	Investigate mechanism to formalize "in-year" reallocation of budget resources	**Completed**. Now part of quarterly variance review.
2b	15	Investigate collaboration when planning campaigns to determine opportunities for partnership and resource-sharing (planning should include Communications to ensure development of integrated campaigns and prevent duplication of effort)	**Investigation Complete.** Processes in place to maximize partnerships and resource sharing.
	16	Investigate increased centralization of purchasing function and requirement of business cases for large expenditures	**In-progress**. Little benefit from future centralization, but possible improvements via greater use of business cases.
2c	18	Update corporate purchasing card policy (restrict use to a defined set of expense types	**Completed** as part of activity #17 (in phase 1).
	19	Develop a succession planning program and provide professional development opportunities for potential successors of critical positions within the organization	**Planned**. Moved from phase 1 to phase 2 given transition of HR Director.
	20	Develop a standard process for first aid training across MLHU	**In-progress**.
3b	22	Investigate mechanism to actively monitor, evaluate, and recognize performance against goals and internal KPIs	**In-progress** as part of activity #21 (in phase 1).
	23	Investigate mechanism to motivate and incent continuous operational improvement	**Ongoing** as part of activity #21 (in phase 1).
4a	24	Investigate expanded use of collective purchasing with external partners	**In-progress**. Membership in the Elgin Middlesex Oxford Purchasing Cooperative (OMOP) providing significant value.
	25	Investigate IT cost avoidance/savings through cost-sharing arrangements via further collaboration with external partners	**Completed.** Now part of standard IT practice.
	26	Investigate opportunities with external partners to share/avoid costs for common, provincial, and/or national campaigns or leverage additional resources	**Investigation Complete.** Processes in place to maximize partnerships and resource sharing.
Rec.	**No.**	**EXCLUDED Activities**	**Comment**
1a	2	Implement procurement module of accounting system	Investigation revealed that efficiency would be derived from automating the purchase requisitions module, but not the procurement module.
4a	27	Investigate adoption of "enhancement of partnerships with external stakeholders" as an organizational priority and require all functions to develop stakeholder maps, a process for determining and evaluating partners, and action plans to establish/sustain partnerships	**In-progress**. Integrate into 2015/16 strategic planning process.