

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	<p>Completed.</p> <ul style="list-style-type: none"> • MLHU now using SharePoint Intranet software which facilitates process automation. • Mileage submissions and reimbursement is now automated • MyTime was introduced for timesheet and attendance management automation • Additional paper-based functions will continue to be automated when opportunities arise.
1b	9	Investigate overhead cost-sharing with the Travel Clinic physicians	<p>Completed</p> <ul style="list-style-type: none"> • Submitted as part of the 2014 PBMA.
	10	Investigate revenue-generating opportunities from providing fit-testing to health service providers and students	<p>Completed.</p> <ul style="list-style-type: none"> • Public fit-testing service was offered as a 1-year pilot and is now continuing. CERV volunteers are assisting and staff hours have been increased to accommodate bookings. • Additional revenue generation was identified during 2015 PBMA with Panorex Dental X-rays. This service will be offered to dental providers as a fee based service.
	11	Investigate revenue-generating opportunities for MLHU to charge speaker-fees	<p>Completed.</p> <ul style="list-style-type: none"> • No additional opportunities identified 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)	<p>Completed.</p> <ul style="list-style-type: none"> • Successful program budgeting marginal analysis (PBMA) process completed in 2013 for the 2014 budget. Over \$1M reallocated toward higher impact services. • The 2nd iteration of the PBMA proposal development was completed in the Fall of 2014 with proposals currently being implemented in the 2015 budget. Approximately

			<p>\$975,000 was reallocated towards higher impact services.</p> <ul style="list-style-type: none"> The Program Budgeting Templates have also become a key alignment tool that links program planning, key performance measures and PBMA
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	<p>Completed.</p> <ul style="list-style-type: none"> Policies reviewed by PwC, MLHU Staff and Board of Health, then implemented. Managers and staff now being educated on policy changes. Financial policies have now been rolled out to staff. Additionally, the policy development and review process is currently undergoing review and will streamline the development, review and implementation of administrative policies at MLHU.
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	<p>Completed.</p> <ul style="list-style-type: none"> All teams required to provide list of PIs as part of 2014 and 2015 operational planning via the Program Budgeting Templates. The 2015-19 MLHU Strategic Plan adopts the Balanced scorecard with organization KPIs. Draft quadrants that will require KPIs include: Program Excellence, Employee Engagement and Learning, Client and Community Confidence and Governance, Accountability and Financial Performance. Cascading scorecards will focus on developing team-specific KPIs that align to organizational KPIs and can be operationalized.
Rec.	No.	PHASE 2 - Activities	Comment
1a	3	Investigate software to automate/manage attendance management	<p>Completed</p> <ul style="list-style-type: none"> MyTime solution was implemented organization-wide (January 2015). Automates both attendance management and pay stubs.
	4	Investigate software to automate/monitor staff learning/development	Completed.

		activities (incl. resume tracking, certification)	<ul style="list-style-type: none"> IT and Human Resources are collaborating to implement a Learning Management System called Lanteria. This solution will allow staff to input their own development activities, HR to assign training, and additional online training modules to be developed.
	5	Investigate software to automate/manage critical incidents	<p>Completed.</p> <ul style="list-style-type: none"> Phase 1, which includes the development, testing and launch of an online tool for the reporting of employee injury/incidents has been completed. Phase 2, which requires the development of SharePoint workflows to be initiated in Q3 of 2015.
1b	6	Reduce bulk inventory and storage requirements	<p>Completed.</p> <ul style="list-style-type: none"> Offsite storage reduced by 200 ft². Included as part of Finance & Operations Operational plan. All purchases of large quantities (more than 4 sq.ft. – to be purchased through Purchasing to determine delivery and storage requirements.
	7	Reduce amount of offsite records storage	<p>Completed.</p> <ul style="list-style-type: none"> Offsite storage reduced by 200 ft². Focusing on highest volume records: immunization consent forms.
	8	Revive Facilities Committee to examine space requirements and determine if MLHU can reduce its footprint	<p>Completed.</p> <ul style="list-style-type: none"> Contracted with Tillman Ruth Robinson architects to conduct space needs assessment.
	12	Investigate revenue-generating opportunities for charging private organizations for Emergency Plan review	<p>Investigation Complete.</p> <ul style="list-style-type: none"> No opportunities at this time.
2a	13	Investigate mechanism to formalize “in-year” reallocation of budget	<p>Completed.</p>

		resources	<ul style="list-style-type: none"> • 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)	<p>Investigation Complete.</p> <ul style="list-style-type: none"> • Processes in place to maximize partnerships and resource sharing. • “We’re Here for You” campaign shared with Elgin and Oxford public health units, including pooling financial resources for focus group testing.
	16	Investigate increased centralization of purchasing function and requirement of business cases for large expenditures	<p>Investigation Completed</p> <ul style="list-style-type: none"> • Included as part of Finance & Operations Operational plan. All purchases of large quantities (more than 4 sq.ft. – to be purchased through Purchasing to determine delivery and storage requirements.
2c	18	Update corporate purchasing card policy (restrict use to a defined set of expense types)	<p>Completed.</p> <ul style="list-style-type: none"> • 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	<p>Completed.</p> <ul style="list-style-type: none"> • Management and Leadership Development Program was approved in PBMA for 2015. To address professional development opportunities for potential successors in critical positions within the organization.
	20	Develop a standard process for first aid training across MLHU	<p>Completed.</p> <ul style="list-style-type: none"> • MLHU has a system in place to meet the First Aid training requirements outlined in Regulation 1101. 2015 efforts are underway to update the roster of certified First-Aiders and refresh their training. • MLHU also provides discretionary CPR Re-certification training to nurses, nurse managers, family home visitors and dental program staff

3b	22	Investigate mechanism to actively monitor, evaluate, and recognize performance against goals and internal KPIs	<p>Completed.</p> <ul style="list-style-type: none"> As part of activity #21 (in phase 1).
	23	Investigate mechanism to motivate and incent continuous operational improvement	<p>Completed.</p> <ul style="list-style-type: none"> As part of activity #21 (in phase 1). Additional continued operational improvement activities will be implemented when feasible and appropriate.
4a	24	Investigate expanded use of collective purchasing with external partners	<p>Completed.</p> <ul style="list-style-type: none"> Membership in the Elgin Middlesex Oxford Purchasing Cooperative (OMOP) providing significant value. Currently participate in larger cooperative bodies such as: OECM (Ontario Education Collective Market) and Provincial Contracts – Vendor of Records. Investigating purchasing of contraceptive medications in partnership with other Health Units.
	25	Investigate IT cost avoidance/savings through cost-sharing arrangements via further collaboration with external partners	<p>Completed.</p> <ul style="list-style-type: none"> 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	<p>Investigation Complete.</p> <ul style="list-style-type: none"> Processes in place to maximize partnerships and resource sharing.
Rec.	No.	EXCLUDED Activities	Comment
1a	2	Implement procurement module of accounting system	<p>Completed.</p> <ul style="list-style-type: none"> 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	Completed.

	<p>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</p>	<ul style="list-style-type: none">• Partnerships and external stakeholders are referenced as key components of the Balanced Scorecard and will influence strongly the strategic priorities that are developed.
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