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Ministry of Education

Service Delivery Transformation

Shared Services Implementation

July 2014

Project Background, Approach and Anticipated Benefits

This project provides plans for implementing shared services for administrative functions in the K-12 sector

Project Background and Context	• Fiscal pressures are creating a challenging financial environment for all public sector organizations in BC and around the world, including school districts • The Ministry and school districts are exploring greater school district collaboration in an effort to reduce administration or non-instructional costs to increase services to the classroom
Project Objectives	25 opportunities have been identified related to shared services and the Ministry is seeking to develop: • Criteria that assesses the identified opportunities in order to understand which to move forward within the near term • High-level engagement principles to guide engagement with sector stakeholders in the implementation of shared services • Development of potential implementation plans for near term opportunities (+3 years) that identify activities and timing for moving opportunities forward, effective management structures and process to track shared services performance
Project Scope	• The development of potential implementation plans for high priority opportunities for shared services in the areas of: Procurement, Transportation, Facilities Management, Information Technology, Human Resources, Finance, Legal and Capital with effective shared services management

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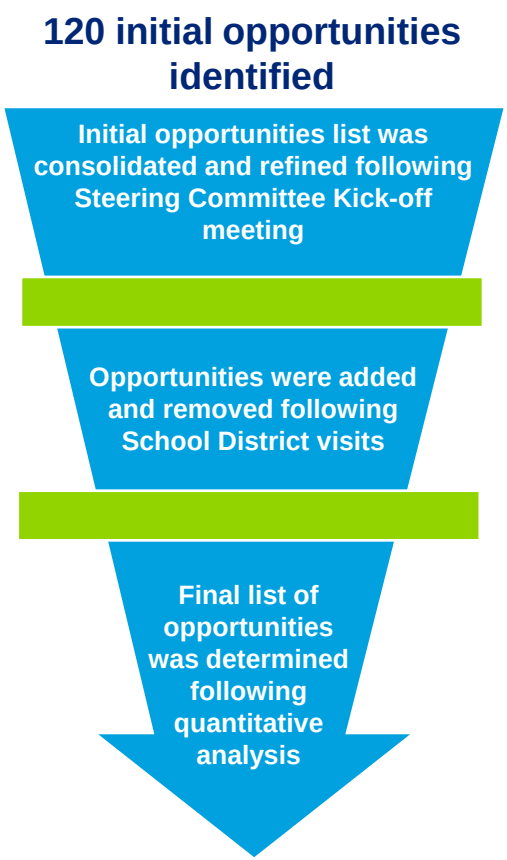
The initial report, which was completed in 2012, identified 25 feasible shared services opportunities



- 120 opportunities were initially identified through:
  - A project Steering Committee
  - Interviews with Superintendents, Secretary-Treasurers and experts
  - Analysis of district- and provincial-level data
  - Public sector and education industry benchmarks
  - Jurisdictional research into governance and operating models in place across Canada and around the world
- 25 opportunities were ultimately presented to the sector for consideration, which ranged from relatively straight-forward to more complex and challenging to implement
- Benefit and cost information was **estimated through sampling and extrapolation**
  - An “order of magnitude” understanding of the potential size of each opportunity on a provincial scale was developed
  - **Detailed business case development was out of scope**
  - A conservative estimate was used in most cases to reflect that some districts were already operating in the future state model or implementing a solution
  - Initial implementation costs were developed based on published third-party estimates and Deloitte experience

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The 25 opportunities spanned eight administrative functions and each was subsequently explored

- The 25 opportunities presented to the sector spanned eight administrative functions
- Further analysis was conducted to understand:
  - The potential benefits and costs associated with implementation
  - Implications of moving forward with the opportunity; and
  - Preliminary timing for implementation

Procurement	Transportation	Facilities Management	Capital Management	Information Technology	Human Resources	Finance	Legal
P-Card (2)	Student Transportation (ASD)	Facilities Management	Project Bundling	Printers and MFDs	HR/Payroll System	Finance Shared Services	Legal Services
Strategic Sourcing (3)	White Fleet Procurement		Common School Design	Email / Unified Comm.	Health and Wellness Support, Occupational Safety		
	Fuel Procurement		P3 Models	SharePoint	WorkSafe Claims Management		
	Transportation CoE		Capital Project Office		Recruitment (2)		
					Dispatch (Staff Complement Mgmt)		

In 2014:
- **White Fleet Procurement** and **Fuel Procurement** have become part of **Strategic Sourcing**
- **SharePoint** has been deemed immaterial
- **Capital Management** opportunities have been merged into a single opportunity
- **Recruitment and Dispatch** have become part of **HR/Payroll System**

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Readers of this report should review prior deliverables for context, additional information and key assumptions

- In 2012, Deloitte delivered a report to the BC Ministry of Education on the topic of service delivery transformation and shared services
- The context for this current report must be considered with an understanding of the prior work completed
- Reviewing the reports in tandem is critical to understanding the underlying assumptions, analysis and limitations of this report.

BC Ministry of Education and School Districts
Service Delivery Transformation
Next Steps

Ministry of Education
Service Delivery Transformation
Shared Services and Implementation Planning

2012

The Ministry engaged Deloitte to identify potential administrative shared services opportunities

The purpose of the service delivery transformation project was to identify opportunities that could be further explored by the sector and the Ministry in an effort to reduce costs and enhance service delivery

2014

The Ministry re-engaged Deloitte to revisit the 2012 report in light of the work that had been achieved within the sector

The objective of this work was to:

- Identify optimal operating models for managing continued shared services implementation in the K-12 sector
- Refresh opportunity benefits and costs; and
- Provide a potential implementation roadmap outlining key implementation stages and milestones
- Provide options for implementing shared services management foundations and opportunities

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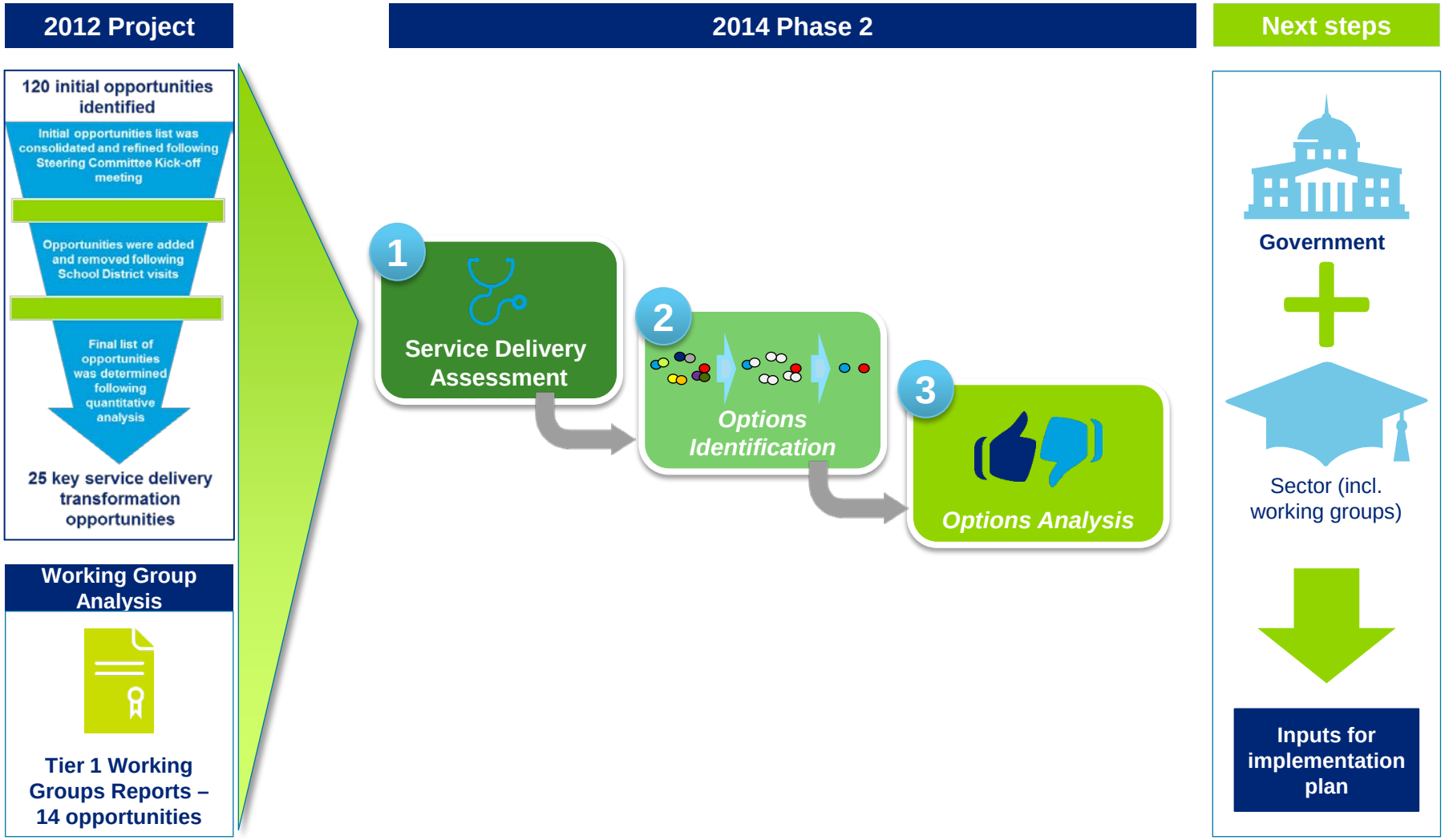
In this report we recommend that the sector validate opportunities, identify suitable operating models and refresh select benefits



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Following implementation, the anticipated net benefits could range from $67M to $160M for the sector

- Net benefits have been calculated for the set of opportunities with recurring costs deducted from recurring benefits
  - **Net benefits do not include one-time implementation costs**
  - **These are high level estimates and a comprehensive business case should be completed to determine more precise benefits and costs**

Function	Opportunities	NET Benefits[5] 2014	
		Low ($M)	High ($M)
Procurement	Strategic Sourcing (includes P-cards, white fleet, and fuel procurement)	$7	$26
Facilities	Facilities Management	$49	$80
Transportation	Student Transportation[3]	$2	$31
IT[1]	Email / Unified Communications and Managed Print Services	$3	$9
HR	Health and Wellness Support (includes WorkSafe Claims Management)	$5	$33
Legal	Legal Services	$1	$3
Sub-total[2]		**~$67**	**~$182**
Business Systems[4]	HR/Payroll, Finance Shared Services System (includes Dispatch and Recruitment)	-$15	-$22
Total[2]		**~$52**	**~$160**

[1] Removed Microsoft SharePoint from opportunity
[2] Estimated net benefits from capital opportunities and business systems have not been included
[3] Transportation costs reflect different service delivery models with the low end estimate a reflection of benefits from a CoE and the high end estimate based off a full outsourced model
[4] HR/Payroll benefits have not been calculated and therefore a net benefit figure largely under estimated – this figure has not been included in total net benefits
[5] Estimated financial benefits and implementation cost ranges have been rounded and may not add

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Initial estimates of costs range from $12M to $35M in one-time investments and $33M to $57M in recurring costs

- These costs reflect those from the 2012 Deloitte report and are based on assumptions that likely, and could, be significantly higher based on implementation approach chosen
- It is recommended that **a more comprehensive business case be completed for each opportunity to determine if additional costs are required(i.e. new infrastructure or workforce adjustments)**

Function	Opportunities	Costs[3] 2014	
		Est. Low end ($M)	Est. High end ($M)
Procurement	Strategic Sourcing (includes P-cards, white fleet, and fuel procurement)	OT: $0.6 R: $0.1	OT: $2 R: $0.4
Facilities	Facilities Management	OT: $2 R: $11	OT: $6 R: $25
Transportation	Student Transportation	OT: $0.5 R: $0.2	OT: $4 R: $0.7
IT[1,2]	Email / Unified Communications and Managed Print Services	OT: $3 R: $0	OT: $5 R: $0
HR	Health and Wellness Support (includes WorkSafe Claims Management)	OT: $0.7 R: $5	OT: $7 R: $5
Legal	Legal Services	OT: $0 R: $0.3	OT: $0 R: $0.3
Sub-total[4]		**OT: ~$7 R: ~$17**	**OT: ~$25 R: ~$32**
Business Systems[3]	HR/Payroll, Finance Shared Services System (includes Dispatch and Recruitment)	OT: $5 R: $16	OT: $10 R: $25
Total[4]		**OT: ~$12 R: ~$33**	**OT: ~$35 R: ~$57**

[1]These one-time cost figures do not include the ongoing Ministry costs associated with the upgrade to the Provincial Learning Network, which are projected to be $5M in 2014/15, $15M in 2015/16, and $13M in 2016/17, $15M in 2017/18, $16M in 2018/19, $20M in 2012/20, and $22M in 2020/21 and beyond
[2] Removed Microsoft SharePoint from opportunity
[3] Business System Finance Shared Services recurring costs provided by the sector and not validated by Deloitte
[4] Estimated costs from Capital opportunities not included and represent from $400K to $600K in recurring costs depending on implementation model selected
[5] Estimated financial benefits and implementation cost ranges have been rounded and may not foot
OT = one-time implementation costs or benefits, **R** = recurring costs or benefits

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Foundations for Implementation

A number of foundational pieces need to be established in order to realize the anticipated benefits

- To effectively manage the shared services program, a number of foundational pieces need to be put in place to efficiently realize benefits

Management Model	• Effective and efficient bodies to provide oversight and management of the shared services program
Resourcing	• Adequate resource to deliver on the implementation and ongoing operations behind each shared services opportunity
Engagement Plan	• A plan for and tools to effectively engage with the sector and stakeholders throughout the implementation of shared services
Benefits Tracking	• An approach for and tools to track the benefits realized by school districts and the Ministry as a whole, from shared services
Legislative Amendments	• Understanding and implementation of legislative amendments required to support shared services
Financial Model	• Financial requirements to fund implementation and ongoing operations • Principles for deployment of savings

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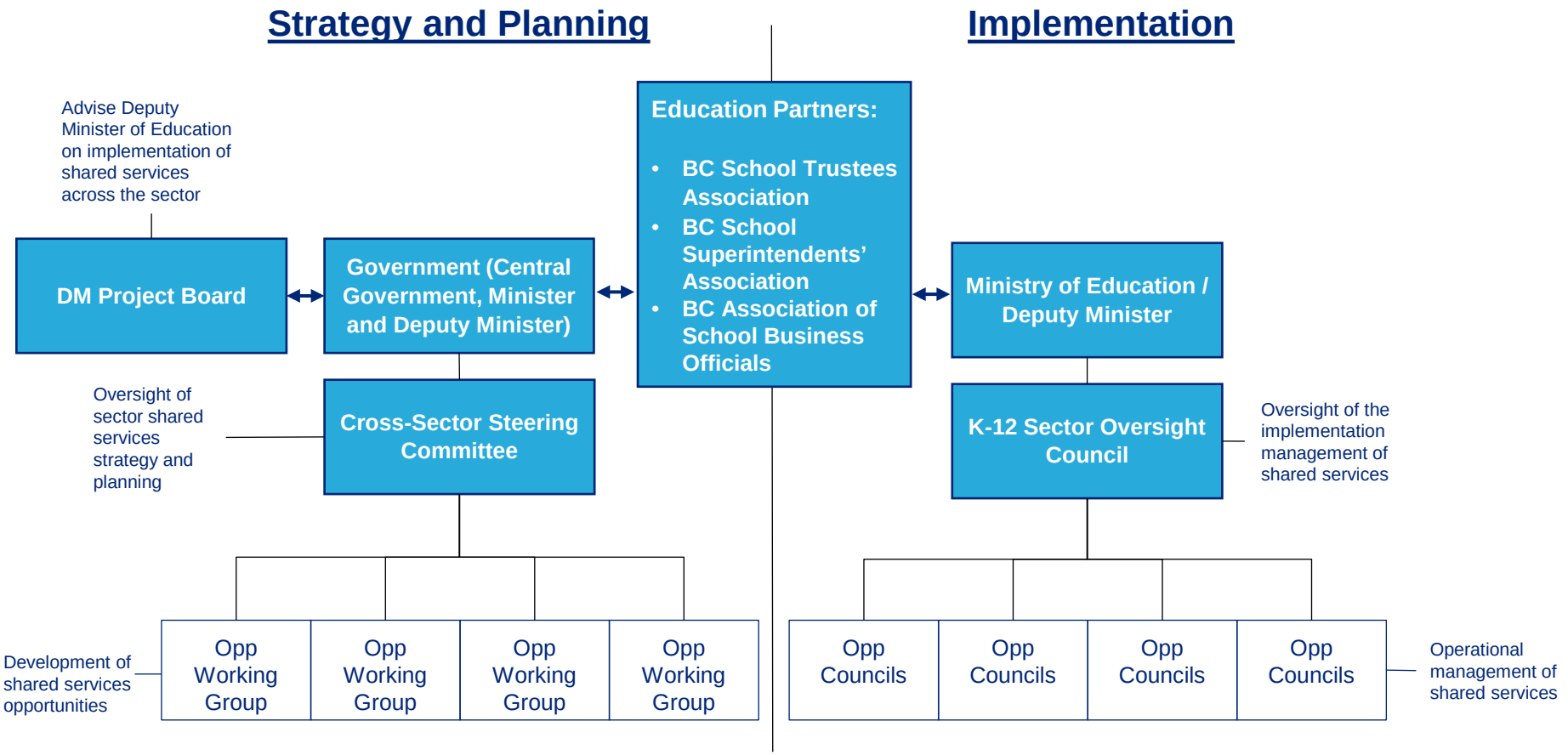
The proposed management models address both strategy & planning, as well as ongoing implementation

- The following depicts the highest level of the proposed management model
- Detailed processes, such as decision rights and flows, will need to be developed as part of detailed implementation planning



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Each level of the management model has a defined set of decision rights and responsibilities

- Decision rights range from ensuring strategic direction to approving how to move forward on specific opportunities

Management Structure	Membership	Mandate	Key Decision Rights and Responsibilities
Strategy and Planning of Shared Services Capabilities			
DM Project Board	Cross section of Deputy Ministers	Provides strategic advice to DM of Education on implementation of shared services across the sector	• Strategic direction for selection of opportunities and implementation approach • Approach for stakeholder engagement • Endorsement of proposed shared services management structures • Final approval for opportunity package (business case, delivery model)
Cross-Sector Steering Committee (CSSC)	Ministry Superintendents Secretary-Treasurers Trustee(s) Appointed Members	Oversight of sector shared services implementation and co-development of opportunity selection and planning	• Direction of Opportunity Working Groups • Direction and scope of approved opportunity implementations • Approve opportunity business cases and investments • Approve opportunity delivery model and supporting working practices • Approve opportunity operational management structures and arrangements • Resolutions for issues and risks raised by the K-12 SOC
Opportunity Working Groups	(cross section from sector)	Development of shared services opportunities, analysis and planning	• Recommend scope of opportunity • Develop opportunity business case • Recommend opportunity delivery model and supporting working practices • Recommend opportunity management model • Recommend key implementation strategies
Operational Management of Implemented Shared Services			
K-12 Shared Services Sector Oversight Council (K-12 SOC)	(cross section from sector)	Oversight of operational management of shared services	• Alignment of shared service operations to strategic vision • Definition for detailed shared service opportunity operating model structures • Definition for detailed shared service opportunity management model structures • Delivery of engagement activities across K-12 sector • Structure and strategic oversight of vendor agreements and relationships • Resolve escalated strategic delivery issues from Operational Councils • Actions to incorporate and resolve district feedback • Opportunity Council leader(ship)
Opportunity Councils	(specific to opportunity participants)	Operational management of Shared Service	• Opportunity Council membership • Vendor management • Resolve delivery issues and risk mitigation • Define participation protocols • Operational decisions • Decide on changes in scope, resources and budget • Manage benefits tracking and realization

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Successful implementation requires engaging with the sector in a manner that adheres to a set of principles and actions

Engagement Principles

- Responsive, inclusive and adaptive
- Open and transparent
- Timely, active outreach to sector to listen and support ideas
- Identify and work with key leaders
- Flexible and ongoing
- Shared ownership and decision making with sector
- Ministry role has visible presence and is accessible – clearly define the role of M/DM/ADM
- Shift from ‘If’ to ‘How’
- Multi-channel engagement
- Measurement of success

Engagement and Communication Strategy

1	Develop a full plan for engagement and communication	• Identify stakeholder groups • Determine engagement team and lead • Draft detailed engagement and communication activities
2	Co-develop implementation plan with sector	• Engage key groups (e.g., BCSTA, BCASBO, BCSSA, BCTF, Support Staff Unions, EFMA, ASTSBC) for input
3	Consider key business timelines	• Align plan to school year, budget cycle, election cycles (Prov. / Municipal / Union), labour bargaining (BCTF/CUPE), and financial statement preparation
4	Leverage the work to date and build on momentum	• Identify existing work to date (e.g., SD project, sector buying groups/consortia) • Adopt and refine as needed
5	By opportunity, engage relevant groups through use of existing structures in place	• Identify and engage key groups
6	Encourage key sector staff to share information	• Identify staff external to the Ministry • Provide support material for communication • Engage regularly
7	Develop Sector engagement `rolling` calendar	• Identify key roles incl. Ms/DMs/ADMs • Include all major events & timing (e.g., regional round tables) for tracking

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Benefits tracking will be guided by a set of principles, while following a defined process

- Measuring, monitoring and tracking benefits is essential to determine the effectiveness of the shared services organization
- A number of principles will guide the benefits tracking process

Benefits Tracking Principle	Definition
Create Baseline	Historical district data will be collected in advance to determine a baseline
Agreement to Process	Districts will understand and agree to benefits tracking process
Sign-off on Baseline	Districts will sign off as to the validity and accuracy of baseline costs – sign-off on assumptions may be required where data is not available
Formal Reporting	Results will be reported on and shared throughout the sector
Focus on Value	Benefits tracking will focus on measures that indicate value creation

Step 1
Define what constitutes "Benefit"

Define cost savings benefits
- Cost reduction
- Cost avoidance

Define non savings benefits
- Service quality
- Risk avoidance

Determine variables for metrics
- Actual versus budget
- Previous versus current

Create and sign-off on baseline

Step 2
Determine how savings will be tracked going forward

Frequency
- Monthly
- Quarterly

Process for sharing
- Tools

Process for reporting

Step 3
Determine who will calculate savings

- **Identify resource(s) responsible for calculating savings**
  - Centralized calculation
  - District level savings calculations

Determine inputs required

Step 4
Assign responsibility for validating savings

- **Identify resource(s) responsible for validating savings**
  - Centralized calculations
  - District level savings calculations

Determine inputs required

Sign-off data collection

Sign-off on reports

Measurability/Objectivity/Comparability

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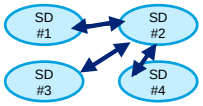
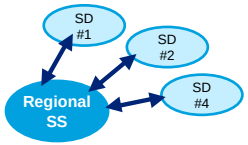
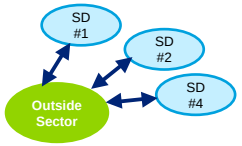
Operating Model

Shared service opportunities can be aligned to one of six potential operating models each with pros and cons

	Decentralized	District-to-district	Centre-led	Regional Co-located	Centralized	External provided (incl. Inter-Ministry)
						
Description	Geographically devolved service delivery – each district delivers own services	Select districts working together to deliver a common service for the other	Centre-led service delivery management with each district delivering service	Partially geographically centralized service delivery (regional level) – could include a regional Centre of Excellence (CoE)	Geographically centralized service delivery to all districts with a single reporting structure (could include Provincial CoE)	Delivery of services provided by an external provider (could include another ministry or government agency)
Advantages	• Service delivery management remains close to schools • Districts retain operational control over service delivery • Standardization somewhat possible with strong leadership • Limited disruption to status quo	• Some efficiencies realized between districts through standardization • Select improvements on service delivery quality • Service delivery management remains close to districts • Builds upon existing exploration and actions of districts	• Maintains high levels of customer intimacy • Supports standardized processes • Limited disruption in service delivery but different reporting structure	• Enables some benefit from economies of scale • Increases process efficiency and standardization • Districts have partial control over service delivery • Can leverage existing geographical efficiencies and Communities of Practice	• Enables greatest benefit from economies of scale • Offers greatest potential for standardizing processes • Offers the greatest control over service delivery	• Potentially shorter implementation timeframe • Leverage external parties existing infrastructure and capabilities districts • Access to more cost-effective services • Inter-ministry supports broader government efficiency goals • Maximizes standardization
Dis-advantages	• Limited opportunities to leverage economies of scale and efficiencies • High degree of duplication of tasks and staff • Highest overall sector costs	• High degree of duplication remains across districts • High cost service delivery	• Limited opportunities to leverage economies of scale and efficiencies • High degree of duplication of tasks between functions • High service delivery cost	• Some duplication between multiple service delivery and reporting structures • Encumbered decision making in individual districts • Requires formalized management model	• May represent significant resistance due to scope of change • Requires new Shared Services Organization (SSO) be developed • May represent significant resistance due to scope of change	• Potential reputational and people impacts • Security and data concerns • Limits direct interaction with customers • Need to develop common criteria for goods or services

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Initial concepts were considered when assessing the operating model to drive shared services going forward

- A central entity responsible for the creation of standard programs, processes and policies across the province will be required
  - This central entity should provide a single contracting vehicle for all shared services from sourcing/procurement through to ASDs (if pursued)
  - This central entity should consider the exploration and implementation of other shared services opportunities as warranted
- Regional service delivery entities will help to manage and roll out the programs across the province
  - Regional entities will be staffed with regional expertise and knowledge
- The central and regional structure would allow the sector to leverage depth of expertise in core areas and broadly share it to enhance quality of service while realizing benefits
- Resources may sit in a single district or region and report to the central entity
- Expertise in select districts could be more effectively shared across the sector
- In the event ASDs are pursued, the sector should maintain control over service delivery policies and governance
- Clarity of roles and responsibilities would be required between the central entity, the regional offices, the districts and the schools

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The proposed shared services operating model combines internal and external service providers with a central SSC

- Envisioned Shared Service Centre (SSC) develops process and procedures and selects vendors
- Regional models with delivery support by districts
- Expansion of select district service delivery due to expertise

Shared Services Centre

- Develop common processes and policies
- Vendor selection / contract management with districts
  - ASDs (Transportation and Facilities)
  - Shared Procurement
- Management of common email and communications
- Health and Wellness Program Administration

Make A Future

Recruitment

BCPSEA

Litigation Risk Pool

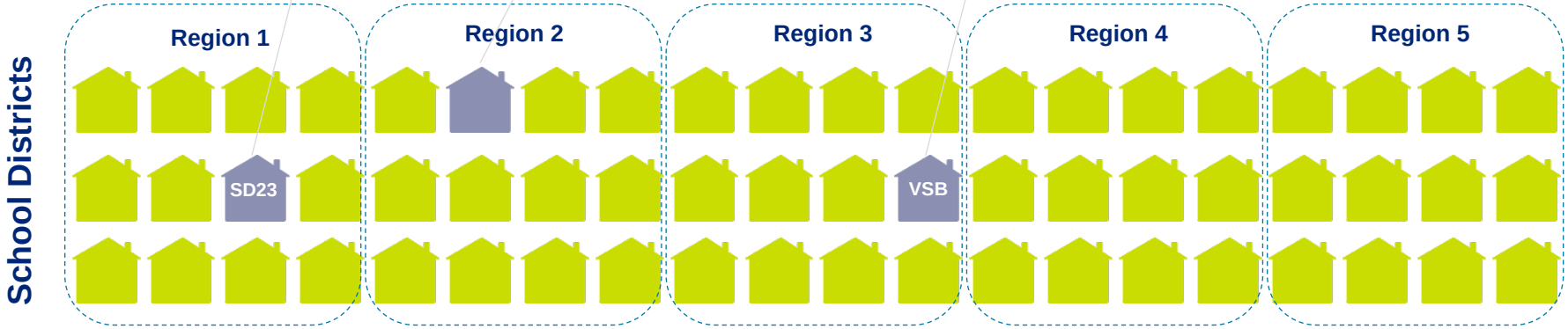
Transportation Provider(s)

Facilities Maintenance Provider(s)

WorkSafe Claims

Capital Projects Office

HR/Payroll/Finance Shared System



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Implementation Roadmap

Implementation planning should build upon work completed and underway to date

2012 Service Delivery Transformation Report	Service Delivery Project & Working Groups	2014 Service Delivery Transformation Report and Implementation Planning	
Identification	**Implementation Progress**	**Design Operating and Management Models**	**Target Setting and Implementation**
Identified 25 shared services opportunities for further exploration by the sector and Ministry • **14** 'Tier 1' opportunities • **8** 'Tier 2' opportunities • **3** 'Tier 3' opportunities	**Working Group advanced five Tier 1 opportunities** • Procurement • IT/Communications • Legal Services • Health and Wellness Support, Occupational Safety • HR/Payroll & Business Systems Realized $4M in savings Ready implementation of Legal Services and select Procurement opportunities Initial planning of shared services implementation	**Validate opportunities and propose suitable operating and management models** • Validate size of opportunities • Review work to date • Assess opportunities and propose operating models • Propose management models	**Savings targets and timeline for implementation[1]** • Determine savings targets and timing • Identify implementation tactics • Plan implementation • Estimate resourcing

[1] The timing for implementation, and hence the implementation roadmap, is based on Deloitte's experiences with similar types of projects
- Timing assumes the availability and competency of human resources to implement the projects
- Assume financial resources are available to support implementation

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Activities to move forward should focus on building the Management Structures and implementing opportunities

- Activities to move forward with Shared Services (SS) include setting up the management infrastructure, establishing program enablers, engaging with the sector, implementing the shared service opportunities:

Management Structures

A Establishment of Sector Management Structure

Objectives:

- To create a sector management model structure
- To create a shared service legal entity / operating model
- To create a SS program office

B Establishment of Program Enablers

Objectives:

- To determine resourcing
- To develop benefits tracking
- To amend legislation
- To develop SS financial model

C Engagement Planning

Objectives:

- To develop an engagement and communications plan
- To collect feedback and input from the sector

Opportunity Implementation

D Execute Implementation of Shared Services Opportunities

Objectives:

- Collect baseline data
- Develop a detailed implementation plan
- Assign project leads and resources
- Work with the sector to define targets
- Execute opportunity activities

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Management Structures

Management Model/Steering Comm. – Strategy and Plan

A

	Design	Implement and Manage
	8 Weeks	Ongoing
Objectives	• Establish management model • Establish shared services office charter and scope statements	Project Kick Off Continue to provide oversight and decision making for the program Assure the goals of the shared services office are being met Monitor engagement and communications plan Program reporting and issue resolution Refine and socialize operating model Consolidated benefits tracking and reporting
Activities	Establish management model terms of reference and scope • Develop program terms of reference • Determine composition of Steering / Advisory Committees, ensure representation from participating functional groups • Determine roles and accountabilities for the Ministry, school districts and BCASBO and additional stakeholders Facilitate meetings with Ministry, school districts and BCASBO Assess barriers to shared services program and develop risk mitigation approach Develop Management Tools	
Deliverables	Terms of Reference including • Management and organization chart • Roles and responsibilities • Membership and composition Management Tools	

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Management Model/Shared Serv. Office – Implementation

A

	Design	Implement and Manage
	8 Weeks	Ongoing
Objectives	• Establish risk and issue management framework and tracking mechanism • Develop reporting approach • Establish office tools and templates	Initiate office and project kick-off Continue to execute program reporting processes Continue to execute communication plans Revise program management tools and processes as appropriate Supporting the program management model Program reporting and issue resolution Refine roadmap plan Revisit stakeholder engagement throughout all opportunities Consolidated Benefit Tracking Track and manage issues and risks Engage stakeholders
Activities	Establish Shared Services Office (SSO) charter and scope • Define the mandate of the Office • Identify needs, work to be done, and expected results • Define roles and responsibilities of office Establish risk and issue management • Define criteria for evaluating risks and issues • Establish methods to track and report risks and issues Establish project and status reporting process • Define status reporting process • Develop status report template • Define deliverable approval process Define quality management plan Establish office tools and templates	
Deliverables	• Shared Services Office Charter • Risk and issue management plan and logs • Status report template • Quality Management Plan • Deliverable approval process	

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B

Operating Model/Legal Entity Creation

	Design	Build	Implement and Manage
	8 Weeks	6 Weeks	Ongoing
Objectives	• Design effective operating model for shared services • Develop legal entity profile and charter	• Create legal entity for shared services • Engage stakeholders in utilizing operating model	Continue to provide oversight and decision making for the program Assure the goals of shared services are being met Coordinate the execution of shared services across the sector Refine and socialize operating model Ensure legal entity is updated as needed Staff legal entity Identify other shared services opportunities for inclusion
Activities	Evaluate Shared Services operating model options • Identify existing shared services structures in government • Identify options for operating models across the set of shared services opportunities • Assess operating models for suitability Design operating model for shared services • Identify structure for managing shared services • Identify resourcing requirements for operating model • Determine location for operating model • Determine legal entity options for operating model structure • Determine reporting structure Facilitate meetings with Ministry, school districts and BCASBO and sector to collect feedback on operating model and legal entity Assess barriers to creating operating model and legal entity and develop risk mitigation approach Develop legal entity charter Obtain legal advice on creation and operation of legal entity	Stakeholder engagement • Ensure stakeholder engagement is considered throughout development of legal entity • Engage stakeholders on operating model usage Build legal entity • Finalize entity structure including roles and responsibilities of entity • Finalize reporting structure Engage in legislation amendments • Determine legislation change requirements and engage in legislation amendment drafting	
Deliverables	• Draft operating model design • Legal entity profile with location, roles and responsibilities • Legal entity charter	• Shared Services Legal entity	

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Benefits Tracking

B

	Design and Build	Implement and Manage
	8 Weeks	Ongoing
Objectives	• Develop standard business case template • Establish opportunity baselines • Initiate data requests	Develop benefit realization schedules and annual benefits summary Communicate benefits measurement approach Translate benefits into operational impact to measure performance Perform ongoing measurement and reporting of benefits progress (min = quarterly, max = annual) Annually revisit business case; update as key assumptions or performance changes Establish automated data gathering processes (where possible) to improve benefits tracking and reporting Integrate into executive dashboard Deliver plan for continued benefits measurement and tracking and corrective action plans for programs not realizing benefit expectations Update benefit predictions and convert to targets
Activities	Develop benefits tracking process (steps, frequency, handoffs, reporting etc.) Define key roles and responsibilities for benefits tracking Develop reporting templates for benefits tracking (including status and trending thresholds) Develop standard business case templates for opportunities (see individual opportunities) Define baseline calculations for: • Projected benefits • Projected costs • Performance measures • Future KPIs Develop data request templates for districts and district sign-off process(es)	
Deliverables	• Business case template • Data request • Baseline calculations • Benefits tracking process	

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Engagement/Communications Plan

C

Identify and Analyze Stakeholders → **Analyze communications** → **Develop Plan** → **Execute, Monitor, Revise**

	4 Weeks	4 Weeks	6 Weeks	Ongoing
Objectives	• Identify stakeholder groups • Conduct stakeholder interviews • Complete stakeholder matrix	• Perform communication channel analysis • Create policies for communication approvals	• Develop engagement/communication plan • Establish key messaging	Execute engagement/ communication plan Distribute communications Track engagement plan activities Track level of stakeholder participation in engagement activities Leverage education "spokespeople" outside of the ministry
Activities	Identify stakeholder groups • Identify stakeholder groups characteristics: name, size of group, types of roles within group Conduct stakeholder interviews • Validate original Stakeholder Analysis findings • Identify future engagement activities per stakeholder group • Gain insights into best practices and lessons learned for engaging stakeholders • Identify key themes in interviews Create the stakeholder matrix • Assess the change impact on stakeholder groups • Identify the influence each stakeholder group has on the success of the project • Group stakeholders into four quadrants using the stakeholder matrix: involve extensively, address concerns, consult as needed, keep informed	Perform communication channel analysis • Identify existing communication channels in use by the Ministry of Education • Establish recommended communication channels for face-to-face, electronic, and print Create communications approval process • Create detailed process for distributing internal and external communications • Identify key personnel to be responsible for approving communications. Expert resourcing may be needed	Develop engagement/communication plan • Define, at a high-level, how the engagement/communications plan will be executed • Appropriately engage stakeholder groups using the key themes and identified engagement activities • Consider required communications for all stakeholder engagement activities • Identify and engage united, visibly supportive leaders that can build enthusiasm and buy-in around the program • Create a time-line with frequencies of all stakeholder communications Establish a unified key message to communicate both internally and externally	
Deliverables	• Stakeholder identification • Key interview themes • Stakeholder matrix	• Channel analysis • Communication approval process	• Engagement/Communications plan • Communications time-line • Key messaging	

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Opportunity Implementation

Legal Services

D

	Validate Baseline	Determine Management and Operating Model	Planning and Rollout	Benefits Tracking and Monitoring and Continuous Improvement
	6 months	6 months	12 months	Ongoing
Objectives	• To collect historical labour litigation information to develop a better understanding of the provision of legal services by sector	• To begin operation of the Pool as a transitional period	• To Implement the Labour Relations Risk Pool and coordination of all Labour Litigation under BCPSEA	Formal benefits tracking and monitoring of legal services will occur as part of the pool Ongoing monitoring and testing of supplier performance including internal government service providers Actuarial review of pool premiums and tracking of investment returns Execute Stakeholder Engagement Collection of Pool premiums
Activities	Collect Historical labour litigation information from districts Establish working relationship between Risk Management Branch(RBM) and BCPSEA Establish working relationship between districts and BCPSEA and RMB Create REQ from legal council Establish system requirements and licenses to database software Confirm legislative authority and inform districts	Establish legal services operational manual and instructions Provide training to district staff Establish data base to collect litigation information and costs Utilization of existing general liability reserve to finance start up costs Revisions of Pool policies and procedures as per lessons learned from transition	Plan implementation of Pool to broader sector Implement coordination of litigation through BCPSEA Establishment of district premiums for 2015/16	
Deliverables	• Establishment of the Pool fund	• Pool operating as part of transitional period •	• Pool is fully operational	

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Health and Wellness Support

D

Determine Baseline

Develop H&W Program

Plan Implementation and Pilot

Implementation, Benefits Tracking and Continuous Improvement

	12 Weeks	4-6 months	12 months	Ongoing
Objectives	• Validate absentee data by district • Research costs of absenteeism • Validate WorkSafe costs	• Develop a best practice Health and Wellness Support Program, framework and supporting tools for B.C.'s K-12 districts	• Develop the implementation plan to support rolling out HW program to all 60 districts	Collect feedback from districts on HW program and revise as per program management model The full implementation of the Health and Wellness Support Program will occur after pilot is completed • Train Principles, Vice-Principles, and district leadership Formal benefits tracking and monitoring of HW program will occur as per shared services office established processes and tools Monitor districts adherence / adoption of HW policy and process Evaluate absence data entry accuracy / compliance by facilities and districts Monitor and evaluate changes in WorkSafe premiums Execute Stakeholder Engagement
Activities	Develop project charter and conduct initial team meeting with project team Develop data collection tool to understand absenteeism in districts • Stakeholder interviews • Current system data Validate data quality and completeness and revise / extrapolate as needed Validate premium and claims by district for WorkSafe and develop benchmark Consolidate data and validate against provincial GL	Determine HW Program management model Research HW programs in other jurisdictions (PSA and outside sector) Investigate opportunities to lower WorkSafe premiums Identify and validate HW program content Develop the HW Program through working sessions with a project working group • Engage with stakeholders, in particular unions Develop supporting materials for HW framework including: • Discussion guides • Monitoring and reporting tools and processes • Benchmarking and targets • Roles/responsibilities • Engagement strategies • Attendance patterns • Absenteeism policies • Align absence codes with collective agreement language	Develop plan of key activities for each district to prepare for beginning their HW • Data collection cycles • Baseline performance • Labour relations • Intervention • Training Define the district engagement as per engagement plan • Identify districts and sequence • Pilot • Target setting Develop management model Pilot Planning • Principal training • Communication to stakeholders Pilot implementation with select districts as per HW implementation plan Update program with lessons learned from pilot	
Deliverables	• Project kick-off and charter • Baseline data on absenteeism by district	• Health and Wellness support program framework • Tools to support HW program	• Health and Wellness support program implementation plan	

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P-Cards

D

Determine Baseline

Onboard New Districts

Benefits Tracking and Monitoring and Continuous Improvement

12 Weeks

12 Months

Ongoing

	12 Weeks	12 Months	Ongoing
Objectives	• Collect baseline data on current use of P-cards	• To communicate the p-card program to districts including the benefits of the program • Onboard new districts	Formal benefits tracking and monitoring of p-card will occur as per shared services office established processes and tools Ongoing monitoring for Policy Compliance Continue to enroll new suppliers Continue to collect feedback from districts on use of new policies, procedures and processes Execute Stakeholder Engagement
Activities	Review and analyze state of purchasing in sector Collect p-card usage from BMO and Shared Services BC Document advantages of use of the cards to share with districts not using the cards	Set goals in partnership with districts Execute onboarding of new districts as per implementation plan • Identify local P-card administer for districts Deliver training to districts including: • P-card program parameters • Optimal purchasing processes • Policies and procedures	
Deliverables	• Document purchasing and p-card usage • Prepare documentation/communications to encourage use by remaining districts	• Additionally on-boarded districts	

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Strategic Sourcing

D

Rev. Existing Agmts.

Validate Wave Categories

Develop Management Model and Legal Entity

Implement (Wave 1)

Implement (Wave 2)

Subsequent Waves

Benefits Tracking and Monitoring

8 Weeks

12 Weeks

6 months

12 months

Ongoing

Objectives	• Understand existing procurement agreements	• Perform spend analysis • Develop category profiles including implementation plan to execute strategic sourcing	• Design and develop procurement shared service target management model including legal entity	• Identification of vendors to provide services to sector • Plan and implement in regions in waves (5-8 categories per wave)	Implementation other wave categories as per sourcing implementation plan Formal benefits tracking and monitoring of sourcing program will occur as per shared services office established processes and tools Ongoing monitoring and testing of supplier performance Ongoing monitoring of district compliance with sourcing Execute Stakeholder Engagement
Activities	Review existing procurement categories • Validate current agreements • Review terms and conditions of agreements (vendors, contract lengths, etc.) Analyze current agreements • Confirm baselines (incl. fuel and fleet) • Benchmark against possible future agreements • Identify potential benefits revising agreements • Identify agreements that can be extended Develop procurement strategy for existing agreements	Develop collection template for spend and leading practices in districts Review spend data and identify categories • Summarize data in each spend category by vendor • Identify top 5-6 spending categories and estimate savings Develop category profiles: • Refine spend baseline • Understand requirements, issues & risks • Define process improvements and specific opportunities • Refine benefits estimate Review procurement processes Create implementation plan	Procurement shared service management model development • Develop management model for collaborative sourcing processes and procedures • Document and map current- and future-state sourcing capabilities and identify improvement opportunities • Develop organization structure and staffing model Legal Entity • Document roles and responsibilities of legal entity • Engage in legislative changes • Seek approvals for legal entity • Create physical legal entity Document Procurement processes	Develop sourcing strategies • Communicate opportunities and confirm approvals • Develop supply management strategy(s) • Develop detailed implementation plan • Develop quote process and package and decision criteria Engage in collaborative sourcing • Compile and analyze responses • Prepare for and conduct negotiations • Evaluate suppliers against criteria • Identify recommended supplier(s) • Develop transition plans Implementation plan • Plan for districts to implement use of provincial contracts by category • Sourcing policy development	
Deliverables	• Procurement strategy for existing agreements	• Spend analysis • High-level implementation plan across all categories including onboarding existing categories in new districts (fuel and fleet)	• Procurement shared service target management model • Procurement processes and procedures • Creation of legal entity	• Detailed sourcing strategies for Wave 1 and 2 categories • Analysis of vendor responses and preferred vendor selection • Category implementation plans • Sourcing policies	

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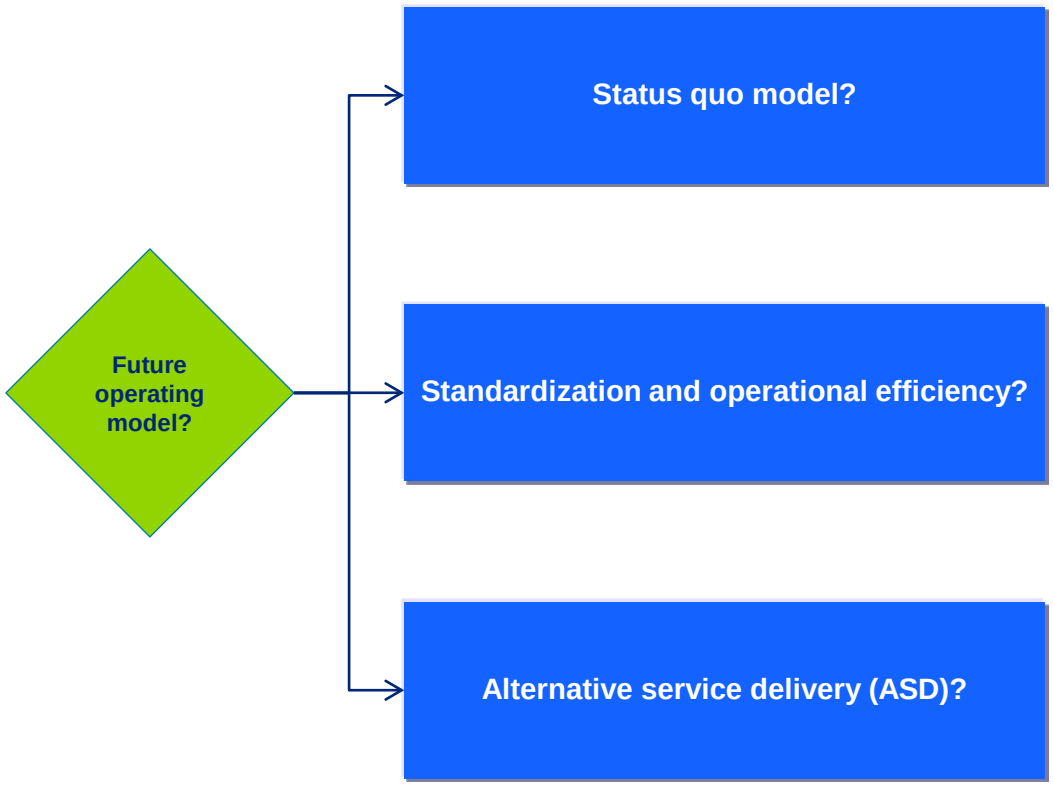
Transportation options analysis phase

	Articulate Scope of Services	Determine Operating Model
	← 8 Weeks →	← 6 Weeks →
Objectives	• Define scope of services for transportation management	• Determine suitable operating model • Explore viable operating models
Activities	Develop transportation mgmt. services list • Research services model/frameworks • Document list of services • Engage districts Collect baseline Transportation data Assess Core vs. Non-Core • Assess list of service and whether core or non-core to sector Research how services bought/sold in marketplace	Research viable operating models for facilities management • Staff augmentation vs. fully outsourced • Assess other jurisdictions and case studies Id. operating model assessment criteria • Time to benefit • Readiness Define target operating and governance model • Engage districts • Asset ownership • Vendors relationships
Deliverables	• Scope of services document	• Transportation Management Operating and Governance Model



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ASD is the most complex and longest duration option

	Articulate Scope of Services	Determine Operating Model	Assess Supply Market	Create RFI/RFP and Vendor Selection	Contacting and Transition Execution	Benefits Tracking and Monitoring
	8 Weeks	6 Weeks	6 Weeks	12 months	12 months	Ongoing
Objectives	• Define scope of services for transportation management	• Determine suitable operating model • Explore viable operating models	• Assess supply market including vendor footprint • Solidify business case	• Develop RFI/RFP procurement vehicle • Develop SOW • Select vendors	• Contracted vendors • Transition to target model	Continue to execute communication plans Formal benefits tracking and monitoring of service providers will occur as per shared services office established processes and tools and as per contracted agreement with vendors Feedback and ongoing vendor management Execute Stakeholder Engagement
Activities	Develop transportation mgmt. services list • Research services model/frameworks • Document list of services • Engage districts Collect baseline Transportation data Assess Core vs. Non-Core • Assess list of service and whether core or non-core to sector Research how services bought/sold in marketplace	Research viable operating models for facilities management • Staff augmentation vs. fully outsourced • Assess other jurisdictions and case studies Id. operating model assessment criteria • Time to benefit • Readiness Define target operating and governance model • Engage districts • Asset ownership • Vendors relationships	Assess marketplace • Outline degree of competition • Identify key vendors and footprint • Revisit case studies and baseline costs Define arrangement terms • Service providers and capabilities • Time frame for deal • Price Business case incl. transition costs Transition planning	Requirements gathering • Engage districts • Doc. requirements Develop RFI/RFP • Dev. procurement strategy • Engage vendors • Document RFI/RFP and SOW • Engage legal • Issue RFI/RFP Evaluate vendors • Det. assess criteria • Due diligence and site visits • Select contractors Refresh trans. plan	Engage in contracting with vendors • Vendor negotiations • Document contract terms • Align on outcomes and service levels • Engage legal Execute transition plan • Creation of operating model	
Deliverables	• Scope of services document	• Transportation Management Operating and Governance Model	• Business case • Draft Transition plan • List of potential vendors	• RFI/RFP • SOW • List of selected vendors • Updated transition plan	• Vendor contracts	

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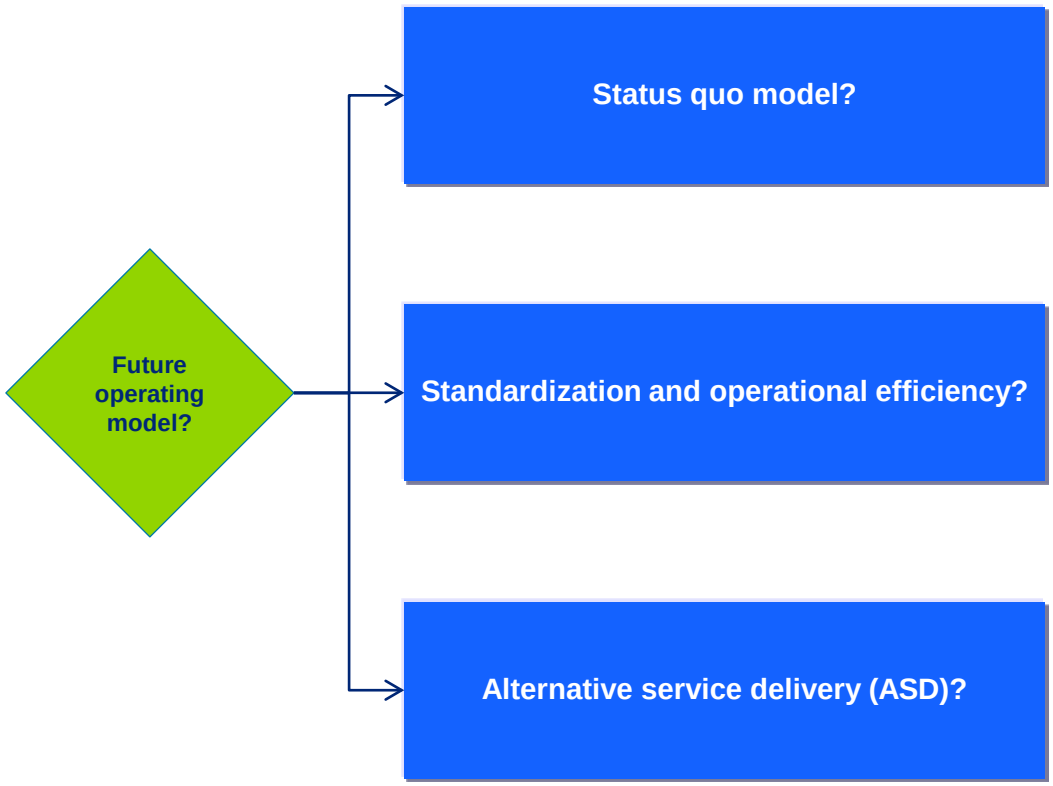
Facilities Management options analysis

	Articulate Scope of Services	Determine Operating Model
	← 12 Weeks →	← 12 Weeks →
Objectives	• Define scope of services for facilities management	• Determine suitable operating model • Explore viable operating models
Activities	Develop list of services required for facilities management • Research services model/frameworks • Document list of services • Engage districts Collect baseline Facilities data • Assess list of service and whether core or non-core to sector Research how services bought/sold in marketplace	Research viable operating models for facilities management • Staff augmentation vs. fully outsourced • Assess other jurisdictions and case studies Id. operating model assessment criteria • Time to benefit • Readiness Define target operating and governance model • Engage districts • Asset ownership • Vendors relationships
Deliverables	• Scope of services document	• Facilities Management Operating and Governance Model



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Similar to transportation, an ASD option is complex

	Articulate Scope of Services	Determine Operating Model	Assess Supply Market	Create RFI/RFP and Vendor Selection	Contacting and Transition Execution	Benefits Tracking and Monitoring
	12 Weeks	12 Weeks	6 Weeks	12 months	12 months	Ongoing
Objectives	• Define scope of services for facilities management	• Determine suitable operating model • Explore viable operating models	• Assess supply market including vendor footprint • Solidify business case	• Develop RFI/RFP procurement vehicle • Develop SOW • Select vendors	• Contracted vendors • Transition to target model	Continue to execute communication plans Formal benefits tracking and monitoring of service providers will occur as per shared services office established processes and tools and as per contracted agreement with vendors Feedback and ongoing vendor management Execute Stakeholder Engagement
Activities	Develop list of services required for facilities management • Research services model/frameworks • Document list of services • Engage districts Collect baseline Facilities data • Assess list of service and whether core or non-core to sector Research how services bought/sold in marketplace	Research viable operating models for facilities management • Staff augmentation vs. fully outsourced • Assess other jurisdictions and case studies Id. operating model assessment criteria • Time to benefit • Readiness Define target operating and governance model • Engage districts • Asset ownership • Vendors relationships	Assess marketplace • Outline degree of competition • Identify key vendors and footprint • Revisit case studies and baseline costs Define arrangement terms • Service providers and capabilities • Time frame for deal • Price Business case incl. transition costs Transition planning	Requirements gathering • Engage districts • Doc. requirements Develop RFI/RFP • Dev. procurement strategy • Engage vendors • Document RFI/RFP and SOW • Engage legal • Issue RFI/RFP Evaluate vendors • Det. assess criteria • Due diligence and site visits • Select contractors Refresh trans. plan	Engage in contracting with vendors • Vendor negotiations • Document contract terms • Align on outcomes and service levels • Engage legal Execute transition plan • Creation of operating model	
Deliverables	• Scope of services document	• Facilities Management Operating and Governance Model	• Business case • Draft Transition plan • List of potential vendors	• RFI/RFP • SOW • List of selected vendors • Updated transition plan	• Vendor contracts	

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Managed Print Services

D

	Spend Analysis and Data Gathering / Develop Requirements	Assess Supply Market	Develop Sourcing Strategy	Execution Sourcing Strategy	Benefits Tracking and Monitoring
	12 Weeks	4 Weeks	8 Weeks	16 Weeks	Ongoing
Objectives	• Perform print spend analysis • Develop category profile for MPS	• Understand supply market for MPS in districts	• Develop plan for MPS implementation across districts	• Identification of vendors to provide services to sector • Plan and execution for implementation in regions	Formal benefits tracking and monitoring of MPS program will occur as per shared services PMO established processes and tools Ongoing monitoring and testing of supplier performance Ongoing monitoring of district compliance with MPS service provider Execute Stakeholder Engagement
Activities	Analyze MP service levels and spend • Develop collection template to collect MP service levels and leading practices in districts • Analyze MP data Review existing MP contracts and procurement processes Summarize MP requirements by district • Conduct interviews with districts to supplement data collection template	Analyze supply market for districts across the Province • Conduct cross province jurisdictional scan of MPS providers by district • Collate results of MPS service providers and analyze	Develop sourcing strategies • Communicate opportunity and confirm approvals • Develop detailed implementation plan • Develop quote process, package and decision criteria Develop Implementation plan • Plan for districts to implement use of MPS Determine operating and management model for MPS provincially • Develop organization structure and staffing model for MPS • Document roles and responsibilities of any new legal entity	Work with districts to identify MPS targets Engage in MPS sourcing • Compile and analyze responses • Prepare for and conduct negotiations • Evaluate suppliers against criteria • Identify recommended supplier(s) • Develop transition plans • Develop specifications Develop MPS policies and procedures with districts	
Deliverables	• Spend MP analysis • Collection of MP requirements by district	• Jurisdictional summary of MPS supply market	• Detailed Implementation plan and execution • Preferred MPS operational and management model	• Analysis of vendor responses • Preferred vendor/supplier • MPS policies and procedures	

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Email and Unified Communications

D

Data Gathering and Strategy Development	Solution Selection	Configure and Test	Plan Rollout and Pilot	Rollout	Benefits Tracking and Monitoring
12 Weeks	6 Months	6 Months	6 Months	12 Months	Ongoing
Objectives					
• Alignment with sector strategy • Gather requirements and usage data	• Issue RFP • Select vendor	• Configure Email and Communications solution	• Pilot solution • Plan cross sector rollout	• Rollout of solution across sector	Continue to execute communication plans Formal benefits tracking and monitoring of service providers will occur as per shared services office established processes and tools and as per contracted agreement with vendors Feedback and ongoing vendor management Execute Stakeholder Engagement
Activities					
Review existing sector IT strategy • Understand sector IT strategy and goals Collect data on district email and communication uses and requirements • Understand existing email and communications platforms • Collect district email and communications costs • Document leading practices in districts Dev. email strategy	Issue RFP • Develop procurement strategy • Engage vendors • Draft RFP • Issue RFP Select service provider • Develop assessment criteria • Evaluate vendor responses • Select vendor • Contract negotiations	Review sector requirements Configure email and communications solution • Engage service provider to configure Test solution • Identify testing users • Revise configurations	Develop pilot strategy • Determine and implement pilots • Collect feedback on pilot • Revise requirements and make solution enhancements Plan sector rollout and migration plan • Develop plan of key activities for remaining district rollout Develop training tools	Execution of rollout plan Training on new email and communication solution	
Deliverables					
• Baseline and leading practices data • Requirements • Email /communications strategy	• Email and communications requirements • RFP • Selected vendor	• Email and communications requirements • RFP • Selected vendor	• Pilot solution • Cross sector implementation plan • Training tools	• Implemented email and communications solution	

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D

HR/Payroll/Finance Shared Services System

	Data Collection Business Req. Validation Strategy Development	Business Case Development	Pilot Implementation	Implementation (other districts)
	26 Weeks	12 Weeks	52 Weeks	TBD
Objectives	• Develop understanding of HR/Payroll/Finance related processes across sector • Validate sector requirements for system	• Develop HR/Payroll/Finance shared services system business case	• Rollout of pilot to key districts • Develop the implementation plan to support rolling out system to remaining 60 districts	Collection of additional requirement from remaining districts Refresh of cross sector implementation plan Collect feedback from districts on system and revise as per program governance The full implementation of the system will occur after pilot is completed Formal benefits tracking and monitoring of system will occur as per shared services office established processes and tools Execute Stakeholder Engagement
Activities	Data collection • Develop data collect template to understand sector wide HR/Payroll/Finance processes and resources • Analyze HR/Payroll/Finance data Validate Requirements • Conduct cross sector working sessions to understand and validate HR/Payroll/Finance business requirements Strategy Development • Develop HR/Payroll/Finance system pilot for sector including implementation approach and scope across the sector • System evaluation including the evaluation of SRB/SIDS and Tier one system • Analysis of administration of solution including shared services organization	Business Case Development • Determine business case content and methodology • Identify and quantify key business benefits and drivers • Identify and quantify implementation costs and ongoing system maintenance costs • Draft business case Seek business case approvals Socialize business case as per engagement plan including validation with sector	Solution selection • PeopleSoft (Tier one) vs. SRB/SIDS solution Implement system pilot to core set of districts • Implement per project plan including system build, test, and training • Collect feedback from districts on pilot Develop management model (ownership, district involvement, ministry) Develop plan of key activities for remaining district to follow to prepare for beginning their rollout of a system (including collection of additional requirements)	
Deliverables	• Validated and expanded set of business requirements for system • System development strategy	• Formal HR/Payroll/Finance shared services business case	• Implementation of pilot system • Implementation plan for remaining districts	

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