



***SOUTH SHORE
and
TRI-COUNTY***

REGIONAL SCHOOL BOARDS

***SHARED Service Agreement
Evaluation Report***

MARCH 2008



Tri-County Regional School Board
Nova Scotia, Canada

Students First

MANDATE

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FINANCIAL SHARED SERVICES

*Administration, Other, Reporting,
Staff Services*

HUMAN RESOURCES SHARED SERVICE

*Administration, Compensation Management,
Employee Relations, Labour Relations,
OHS, Planning, Staff Supervision,
Staffing, Technology Info.*

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MANDATE

PREAMBLE

Early in January, 2008, the Joint Management Committee of the South Shore/Tri-County Shared Services Agreement requested support from the Department of Education to assist with the evaluation component of the Agreement. Regional Education Services was tasked by Dr. Alan Lowe with providing the support requested by the Joint Management Committee.

On January 16, 2008, members of the Joint Management Committee held discussions with Regional Education Services Director, Jim Burton, to scope out the task. Following discussion, it was agreed that the Regional Education Services Division of the Department of Education would be engaged to facilitate the process of evaluation of the Shared Services Agreement.

MANDATE

Specifically, RES would utilize the questionnaire designed to gain response to the areas of responsibility articulated for Finance and Human Resources under the Shared Services Agreement.

The group to be polled for input would include Board Members, School Board Central Office Staff, Staff of the Finance and Human Resources Divisions of each Board, Principals, Administrative Assistants at school sites, and Union Representatives.

Time lines were established for conducting the survey.

The results were to be analyzed by RES and a report generated.

The report ideally would be presented to the Joint Management Committee by February 29, 2008.

Response input would be tabulated and reported upon. Observations and generalizations ascertained from the comments of participants would be shared as part of the report.

EXECUTIVE SUMMARY

Following the dissolving of the Southwest Regional School Board and the completion of the Southwest School Board Pilot Structure, the South Shore Regional School Board and the Tri-County Regional School Board were officially established on August 1, 2004. At that time a Shared Services Agreement was established to provide Financial Services and Human Resource Services to both Regional School Boards. These services were provided under the auspices of a Joint Management Committee.

In compliance with the Terms of Reference of the Shared Services Agreement, the Joint Management Committee engaged the Department of Education to facilitate an evaluation of the impact the Shared Services Agreement was having on each School Board. As Director of Regional Education Services, the task of facilitation was assigned to me.

A questionnaire containing the role and responsibility, as well as key operating areas for Financial Services and Human Resource Service was developed. The questionnaire was designed to solicit a rated response as to respondent knowledge and opinion as to what, and how, Financial Services and Human Resource Services were doing in support of the Board, its employees, and others they serve. In addition, respondents were encouraged to provide input identifying things that were working well and make suggestions for improvement. Finally, general comments and recommendations were invited.

The questionnaire was circulated by e-mail and hard copy to School Board Members; Employees of the Board including—Central Office Directors, Coordinators, Manager and Staff of Finance and Human Resources, plus Principals and Administrative Assistants at school sites; as well as several Union Representatives. Of the 208 questionnaires circulated to individuals, 85 responses were generated. The response rate expressed as a percentage equals 41%.

Respondents affirmed that the Financial Services Staff and the Human Resources Staff are carrying out their legislative and policy functions to a high degree. The comments of respondents endorse the strong support role being fulfilled by both Finance and Human Resources.

With less than twelve percent of respondents advocating for the Boards to have their own Financial Services and Human Resources Service Divisions, there is insufficient evidence to support the recommendation that each Board have its own Finance and Human Resources Division.

In light of the introduction of Professional Learning Communities changes in procedure and practice, some change in role and responsibility relative to leadership and the importance of all team players working from the same knowledge base, it will be important to establish and retain strong communication links among all who are involved.

While respondents provided a series of suggestions for improving both what is delivered in a support role to schools from Finance and Human Resources as well as how it is delivered, a strong and respected service ethic does exist. It is on this base that improvements can be built.

Financial Services Administration

Of the 85 responses received, between 44 and 58, or 52 to 68 percent, of respondents indicated that the criteria or job tasks posted under the *Administration Category* in Financial Services did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 39 percent and 59 percent of these respondents rated Financial Services Personnel as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT FINANCIAL SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF FINANCIAL SERVICES ADMINISTRATION —

- Respondents acknowledged that the Director of Finance is knowledgeable and approachable and that he is supported by a competent, hardworking staff.
- The Financial Services Division has consistently demonstrated fiscal responsibility, responds to inquiries in a timely fashion (despite the challenge of distance in some cases), and keeps the finances of Tri-County and South Shore on-track.
- The Director and Staff have instituted a good system of internal controls.
- The development of the *School Based Funds Manual* is viewed positively.
- Scanning capability, recently introduced, has increased productivity and has encouraged staff to work more closely as a team.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF FINANCIAL SERVICES ADMINISTRATION INCLUDE —

1. Less than 20 percent of respondents indicated that the *location* of the majority of the Financial Staff at one site impacts on the ability to communicate and to bring quick resolution to financial issues and concessions.
2. The introduction of SAP in the area of HR/Payroll remains a challenge and serves as a source of frustration for staff as well as impacting on school sites.
3. Less than 20 percent of respondents identified some challenge with the Shared Financial Services split. More time and greater accessibility of Financial Staff by Tri-County, better tracking of reports and requests for information by Financial Staff, role clarity for Payroll Staff, issues with single sourcing, and timely payment of invoices are several of the areas of contention and frustration voiced by respondents.

FINANCIAL SERVICES REPORTING

Of the 85 responses received, between 31 and 64, or 36 to 75 percent, of respondents indicated that the criteria or job tasks posted under the *Reporting Category* in Financial Services did not apply, or the respondent had little or no knowledge when such an task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 69 percent and 83 percent of these respondents rated Financial Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT FINANCIAL SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF FINANCIAL SERVICES REPORTING —

- Board Members, who self-identified by commentary, indicated that reports received by the Board Members are complete, timely, and easily read.
- Board Members noted there had been changes for the better in their ability to manage the budget which previously had been problematic, frustrating, and challenging.
- Monthly data sheets and access to SAP have improved.
- School-based personnel indicated they receive monthly printouts of the budget figures and are just adjusting to SAP reports.
- A wide variety of reports are available including *Energy Usage*. The Supply and Library Accounts are also helpful.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF FINANCIAL SERVICES REPORTING INCLUDE —

1. While the previously noted strengths exist, frustration abounds with some aspects of Financial Services work in some areas of the Boards. In addition to the Library and Supply Accounts, several school-based personnel indicated they would like to see a detailed list of accounts linked to schools.
2. Managers, coordinators, and others appear to experience difficulty in accessing timely and accurate records of DOE-funded initiatives and targeted funding. This frustration appears to be more prominent from respondents in the Yarmouth / Tri-County Area.
3. The timeliness of some reports and the absence of detail is an expressed concern of a small number of respondents.
4. Communication gaps, distance, and accessibility issues were also cited by some respondents.

FINANCIAL SERVICES STAFF SERVICES

Of the 85 responses received, between 63 and 67, or 74 to 79 percent, of respondents indicated that the criteria or job tasks posted under the *Staff Services Category* in Financial Services did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 31 percent and 37 percent of these respondents rated Financial Services Personnel as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT FINANCIAL SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF FINANCIAL SERVICES STAFF SERVICES —

- Of all the areas in Financial Services, this Category contained the highest level of not being applicable or an area on which respondents had little or no knowledge.
- The level of recognition of activity by Financial Services Staff as denoted in respondents' ratings was across the Board. The very separation of the major components of HR and Finance (Yarmouth and Bridgewater) may have contributed to this.
- Respondents did not want to focus in their comments on the relationship implied between HR and Finance but rather focused on the separation in purpose and distance.
- Comments around the personal/professional development component, on policies developed and approved by the Board were noted in a couple of instances.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF FINANCIAL SERVICES STAFF SERVICES INCLUDE —

1. The suggestion was made in several instances that AP/AR would be better served in Tri-County if the services were based there.
2. Approximately fifteen percent of respondents indicated each Board would be better served (efficiency and cost effectiveness) if they had their own Finance Division.

FINANCIAL SERVICES OTHER

Of the 85 responses received, between 25 and 64, or 29 to 75 percent, of respondents indicated that the criteria or job tasks posted under the *Other Category* in Financial Services did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 22 percent and 80 percent rated Financial Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT FINANCIAL SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF FINANCIAL SERVICES *OTHER* —

- Respondents acknowledge that the Financial Services Division is very supportive.
- School audits are well done by a professional, pleasant, knowledgeable, and helpful individual.
- There is recognition that the Purchasing Department is very busy. The Policy is being revisited and updated.
- The work of the Financial Services Division in the area of School Funds, the Board's Insurance Program, and the Audit Committee was recognized as being highly-supportive.

SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF FINANCIAL SERVICES *OTHER* INCLUDE —

1. Respondents keyed in on the significance of professional development and training in a *change* environment. Respondents indicated that lead time and additional support by Financial Services is required in the delivery of services as well as information sharing on new programs / initiatives being implemented; i.e., SAP Training for new practices and procedures requires more attention.
2. Some concern was expressed about the tendering of equipment purchases. Respondents recognized the challenges for the Purchasing Department, particularly the distance and time frame associated from requisition to payment.
3. Several respondents noted that communication with respect to administration of Employee Pension Plans is slow in terms of response time.

HUMAN RESOURCES ADMINISTRATION

Of the 85 responses received, between 41 and 57, or 48 to 67 percent, of respondents indicated that the criteria or job tasks posted under the *Administration Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 59 percent and 85 percent of these respondents rated Human Resources Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCES SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF HUMAN RESOURCES ADMINISTRATION —

- Respondents acknowledge that the Director of Human Resources is knowledgeable, very approachable, and is responsive to the needs of the staff and the system.
- The staff of HR are viewed as supportive and constantly put the needs of the employees first.
- Board Members, in responding to the Administration Category of HR, expressed appreciation at the manner in which the HR Staff keeps the Board Members informed of HR issues, provides minutes of meetings and the Annual Staffing Report to the Board. The advice received by the Board from HR is viewed as being reliable and timely.
- There is a perception that both Boards get equal treatment by HR Staff.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HUMAN RESOURCES SERVICES ADMINISTRATION INCLUDE —

1. Respondents suggest that some work remains to be done in the development and approval of job descriptions.
2. Some site-based personnel indicate that the time frame for hiring is tight, and some concern was expressed with regard to inordinate time lines for securing Board approvals for hiring.
3. Those that advocated for separate HR Departments for the two Boards (less than 20 percent) suggest that better outcomes and efficiencies could be had with separate HR Departments.

HUMAN RESOURCES COMPENSATION MANAGEMENT

Of the 85 responses received, between 49 and 58, or 58 to 68 percent, of respondents indicated that the criteria or job tasks posted under the *Compensation Management Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 64 percent and 69 percent of these respondents rated Human Resource Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCES SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREA OF HUMAN RESOURCES COMPENSATION MANAGEMENT —

- HR has been helpful in providing grids which delineate where people should receive compensation based on a formula.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HUMAN RESOURCES SERVICES COMPENSATION MANAGEMENT INCLUDE —

1. A couple of respondents indicated that employees should have greater input into their Employee Benefits Program.
2. Given that respondents identified that the evaluation of positions had occurred only twice since 1996, some suggested that the evaluation of job descriptions with respect to responsibility and compensation should be reviewed again.
3. Those advocating for the separation of HR Shared Services suggested that there would be *better results, greater efficiency, and happier Boards and staff*. None of these positions or statements were qualified.
4. It was further suggested that any communication gaps between HR and staff with regard to proper payment of staff could be better handled if the HR function existed in each Board.

HUMAN RESOURCES EMPLOYEE RELATIONS

Of the 85 responses received, between 25 and 47, or 29 to 55 percent, of respondents indicated that the criteria or job tasks posted under the *Employee Relations Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 43 percent and 79 percent of these respondents rated Human Resource Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCE SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF HUMAN RESOURCES EMPLOYEE RELATIONS —

- The HR Division has taken a proactive approach to wellness.
- The HR Division is viewed by respondents as being a supportive and knowledgeable staff in the area of Employee Relations.
- Board Members commented on the excellent level of support provided by HR in dealing with rights in the work place and assistance with difficult HR issues.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HUMAN RESOURCES SERVICES EMPLOYEE RELATIONS INCLUDE —

1. A criticism of HR in relation to Employee Relations is the communications piece. Changes in expectations and changing processes/procedures require constant dialogue. A couple of respondents identified this as a concern.
2. One respondent spoke to the issue of the need for a more proactive approach by HR in the area of supervision of instruction.

HUMAN RESOURCES LABOUR RELATIONS

Of the 85 responses received, between 44 and 62, or 52 to 73 percent, of respondents indicated that the criteria or job tasks posted under the *Labour Relations Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 79 percent and 95 percent rated Human Resource Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCE SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF HUMAN RESOURCES, LABOUR RELATIONS —

- HR Staff have taken the lead in negotiations and have served the Board well in arbitration disputes.
- Policies and procedures designed to support Human Rights and respect the dignity of all who serve, and are served, by the School Board are in evidence in the assessment of Labour Relations by respondents.
- The HR Department is held in high regard by respondents when it comes to labour relations criteria. All regulatory legislative and negotiated items on behalf of the Board and the employees are acknowledged as well handled by respondents who registered comments.

SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HUMAN RESOURCES, LABOUR RELATIONS INCLUDE —

- A small group of respondents, less than 12 percent, indicated that Labour Relations would be better served if both Boards has their own HR Department.

HUMAN RESOURCES OCCUPATIONAL HEALTH and SAFETY

Of the 85 responses received, between 24 and 63, or 28 to 74 percent, of respondents indicated that the criteria or job tasks posted under the *OHS Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 23 percent and 73 percent of these respondents rated Human Resource Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCE SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF HUMAN RESOURCES, OHS —

- The legislated programs and responsibilities under OHS are well done.
- School and Board staff appreciate the support received in this area by HR Staff.

SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HUMAN RESOURCES, OCCUPATIONAL HEALTH AND SAFETY —

- It is the contention of many respondents that despite best efforts there is always more to do in the OHS area.
- There is a belief on the part of a number of respondents that:
 - ☞ staff should be more visible
 - ☞ extra work is required in the interpretation and implementation of safety guidelines in curriculum areas
 - ☞ OHS staff should analyze WCB and SIP as well as Injury-on-Duty Claims with a view to interpreting data, predicting trends, and setting out interventions
 - ☞ environmental concerns are substantial enough to warrant additional staffing considerations.

HUMAN RESOURCES PLANNING

Of the 85 responses received, between 45 and 50, or 53 to 59 percent, of respondents indicated that the criteria or job tasks posted under the *Planning Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 48 and 71 percent rated Human Resource Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCE SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREA OF HUMAN RESOURCES PLANNING —

- A particular strength of the HR Division is the provision of advice to the Board on areas of Legislation, Regulation, and Policy.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HUMAN RESOURCE SERVICES PLANNING INCLUDE —

1. A small group of respondents noted the need to enhance recruitment opportunities and to develop a Succession Plan.
2. Those who advocated for a separate HR Department for each Board suggest that it would be easier to carry out planning (projections on enrolment and staffing needs) if the Boards were separated.

HUMAN RESOURCES STAFF SUPERVISION

Of the 85 responses received, between 48 and 58, or 56 to 68 percent, of respondents indicated that the criteria or job tasks posted under the *Staff Supervision Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 17 percent and 46 percent of these respondents rated Human Resource Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCE SERVICES WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF HUMAN RESOURCES STAFF SUPERVISION —

- In-services by HR personnel for site-based personnel involved in Supervision were appreciated.
- Professional Growth Plans are being done.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HR SERVICES STAFF SUPERVISION INCLUDE —

1. Some site-based respondents documented that some clarification is required on formative Evaluation vs Professional Growth Planning.
2. Site-based Administrative Assistants are calling for organized PD in the areas of software like *Quicken* as well as site-based support for *SAP*.
3. More emphasis is being requested to be placed on developing PD Plans. A template would be supportive and is viewed as promoting consistency.

HUMAN RESOURCES STAFFING

Of the 85 responses received, between 16 and 26, or 19 to 31 percent, of respondents indicated that the criteria or job tasks posted under the *Staffing Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 93 percent and 96 percent of these respondents rated Human Resource Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCE SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF HUMAN RESOURCES STAFFING (*the respondents to the survey are united on their perspective in the area of Staffing*) —

- Respondents are very complimentary in their praises of the work of HR in the area of *Staffing*. This is the one area in the entire survey where the number of rated responses significantly outnumber the "do not know" / "not applicable" area.
- HR Staff are viewed as being very supportive of site-based staff in this area. HR Staff are viewed as effective, efficient, and very helpful. The web-based software for HR is viewed as working well. The Hiring Process established by HR is solid, fair, and well supported.
- Strong HR Staffing Procedures make staffing easier.

COMMENTS / SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HUMAN RESOURCE SERVICES STAFFING INCLUDE —

1. While the support for the Staffing Category work of HR is exceptional, respondents took the opportunity provided through the survey to offer the following comments:
 - a) In some competitions, there is a limited window of opportunity to apply.
 - b) The distance between the two Board Centres poses some challenges.
 - c) There was a recognized need among a couple of respondents to improve communication between Finance and HR with respect to assignment to appropriate cost centre, particularly as it relates to targeted DOE-funded positions / initiatives.
 - d) School site respondents noted the need for PD centered around the Staffing Process.

HUMAN RESOURCES TECHNOLOGY INFORMATION

Of the 85 responses received, between 26 and 53, or 31 to 62 percent, of respondents indicated that the criteria or job tasks posted under the *Technology Information Category* in Human Resources did not apply, or the respondent had little or no knowledge when such a task/action was deployed.

Of the respondents who provided a rating from *Rarely (1) to Very Frequently (5)*, between 63 percent and 81 percent rated Human Resource Services as *Very Frequently* attending to the tasks listed in this Category.

RESPONDENTS INDICATED THAT HUMAN RESOURCE SERVICES STAFF WERE ACHIEVING WELL IN THE FOLLOWING AREAS OF HUMAN RESOURCES, TECHNOLOGY INFORMATION—

- Respondents acknowledge in reasonably high numbers that the technical support provided via internet or telephone is excellent.
- Site-based personnel noted that having the presence of technical support readily available at-hand is effective and efficient and limits downtime and minimizes frustration.
- The work done by technicians is well recognized in the area of implementation and monitoring of network systems.

SUGGESTIONS FOR IMPROVEMENT IN THE AREA OF HUMAN RESOURCES, TECHNOLOGY INFORMATION INCLUDE —

- It is in the area of *Integration of Technology Into the Classroom and Across the Curriculum* that a number of respondents note an area for improvement. At the same time these respondents acknowledge that technical problems are solved in relation to the person's hours available to devote to the task. The technical support requirements for effective and efficient operation of the system are demanding, leaving little time for program-related issues.
- Site-based users indicate a need for reports on the state of their technology more often.
- A number of principals view the need for additional time for technicians to service their school as significant and in need of address.
- With work orders not completed, some believe there is a need to revisit the staffing complement in Technology Services.
- Less than ten percent voiced an opinion that there should be separate HR functioning in the two Boards as it relates to technology support.

RESPONDENTS

GENERAL COMMENTS

As part of the questionnaire, respondents from Tri-County and South Shore were provided with an opportunity to add any additional comments and were given the opportunity to make specific recommendations.

Some of the comments represent summary statements of what had been said by respondents at some point in the body of the questionnaire. General comments included —

- ☞ In Human Resources three individuals work in Tri-County, three work in the South Shore, and the Director is split 50/50.
- ☞ The HR Staff is viewed as being exceptionally supportive.
- ☞ It was the perception of two respondents that while the number of staff at Central Offices continues to increase, work continues to be downloaded to the school sites.
- ☞ Four respondents saw an advantage to have all members of a Division; i.e, *Finance*, under one roof.
- ☞ Confusion exists on the part of some employees as to *what information / documentation* needs to go to *what office*.
- ☞ One respondent suggested Department of Education staff might wish to speak to the Director of Finance and the Director of Human Resources specifically on the Shared Service Agreement.
- ☞ Additional professional development is required for principals and administrative assistants on the Budget, SAP, and Finances.

RESPONDENTS RECOMMENDATIONS

- Ten (10) respondents specifically recommended that each Board have its own Finance and Human Resources Staff. Four (4) of these ten (10) and one other indicated that each Board should have its own Technology Division.

- Approximately fifteen percent (15%) of respondents recommended schools require additional technical support personnel to be available to the site.

- Two individual respondents recommended that common policies and guidelines be utilized by Finance and HR Staff and that the Shared Service Model remain intact.

- One respondent highlighted a plan for establishing separate HR and Finance Divisions within each Board. The respondent acknowledged that such a recommendation would require three-to-six additional staff members over and above the twenty-three in place.

COMMENTARY AND OBSERVATIONS

- a. Both the Financial Services Staff and the Human Resources Services Staff are carrying out their legislative and policy functions under the Shared Service Agreement.
- b. While distance between administrative centers and separation of staff in each service component (Finance and HR) is recognized as a deterrent to efficiency within the Boards, there is neither consensus nor substantial evidence that would rationalize the creation of separate Finance and HR Divisions for these Boards at this time.
- c. The incidents cited that reflect inefficiencies which detract from effectiveness, or relate to communication breakdowns, could be minimized in the view of this writer through the re-emergence of a strong senior management team in each Board working within the existing structure. It is conceded that the establishment of regular senior staff meetings would be taxing on two of the four-or-five senior staff; however, the benefits of regular and frequent meetings outweigh the disadvantages.
- d. As roles and responsibilities change relative to the service delivery through the introduction of Professional Learning Communities, support services such as Finance and Human Resources will, in addition to their policy and legislative mandates, need to support the school sites in the areas of quality control, accountability, record keeping, and reporting to ensure staff at these sites are prepared to deal with data collection, analysis, interpretation and manipulation so necessary for decision-making and goal-setting. Finance and HR will need to provide lead time for adjusting to change in practices and procedures as well as standing ready to provide PD opportunities and supports.
- e. Where breakdowns in communication occur, it is incumbent on senior staff, directors, coordinators, and managers to identify what services are to be provided and the extent to which they must be reported upon. This type of information seems to be lacking and Financial Services sometimes receive unwarranted criticism for the lack of timely response when the parameters have not been clearly set.