



# Community Shared Services

**What it Looks Like and What We  
are Learning**

November 2025



# Introductions

- High Performance Coach and Transformation Consultant
- 26 years of experience working with Community Organizations
- I have managed massive system level transformation for MOH, MCYS, MGS, etc.
- Focuses on organizations providing disability services, family services and child/youth mental health, and Autism Services
- Certified/Trained in:
  - Applied neuroscience
  - High performance coaching
  - Change management
  - Project management
  - Organizational Design
  - IT analysis
  - Lean Six Sigma

*I use neuroscience, psychology and high-performance skills, tools and approaches to help people and teams overcome their challenges, reach peak performance and live a thriving life, while maintaining balance and positive relationships*

## **Summary of my Community SSO Experience:**

- Project lead for feasibility and implementation of 5 separate hospital shared services projects
- Project lead for many different Community Services SSO projects
- Helped the SE LHIN wind down broken SSO arrangements
- Completed best practices white paper for the Provincial Government
- Completed all phases of research, feasibility, design, implementation and post-implementation assessment
- Currently doing a post-implementation review for OSSO (which I helped to create)

# Introductions

- Michele Bell is the Chief Executive Officer of Tri Alliance Shared Services, a not-for-profit charitable organization that provides centralized management and administrative services to three community living organizations: *Community Living Owen Sound and District*, *Community Living Walkerton and District*, and the *Bruce Peninsula Association for Community Living*.
- Michele has been an instrumental leader in the creation and evolution of Tri Alliance. As the Executive Director of two of the three founding agencies, she was involved from the very first exploratory discussions in late 2018, through to the launch of operations in January 2022, and has led the organization through its critical first four years.
- Prior to her current role, Michele held senior leadership positions in human resources and labour relations within the not-for-profit sector in Toronto, bringing over two decades of experience in executive management to her work at Tri Alliance.

# Purpose

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To provide leaders with a practical understanding of how Shared Services work in community organizations

- what they look like in real operations,
- what makes them successful, and
- what lessons can help others considering this approach





# Goals

**By the end of this session, participants will:**

- **Understand** what Shared Services look like in Finance, HR, and IT operations.
- **Identify** the characteristics and success factors of effective shared service models.
- **Recognize** common challenges and what to anticipate during implementation.
- **Learn** from real examples of what has worked — and what hasn't — in existing shared service organizations.

# Introduction to Shared Services

*Best Practice view of service delivery models, success factors and other considerations for Community Shared Services*

# What Are Shared Services?

Shared services refer to a model where multiple organizations **collaborate to consolidate** administrative or operational functions, improving efficiency, reducing costs, and enhancing service quality.

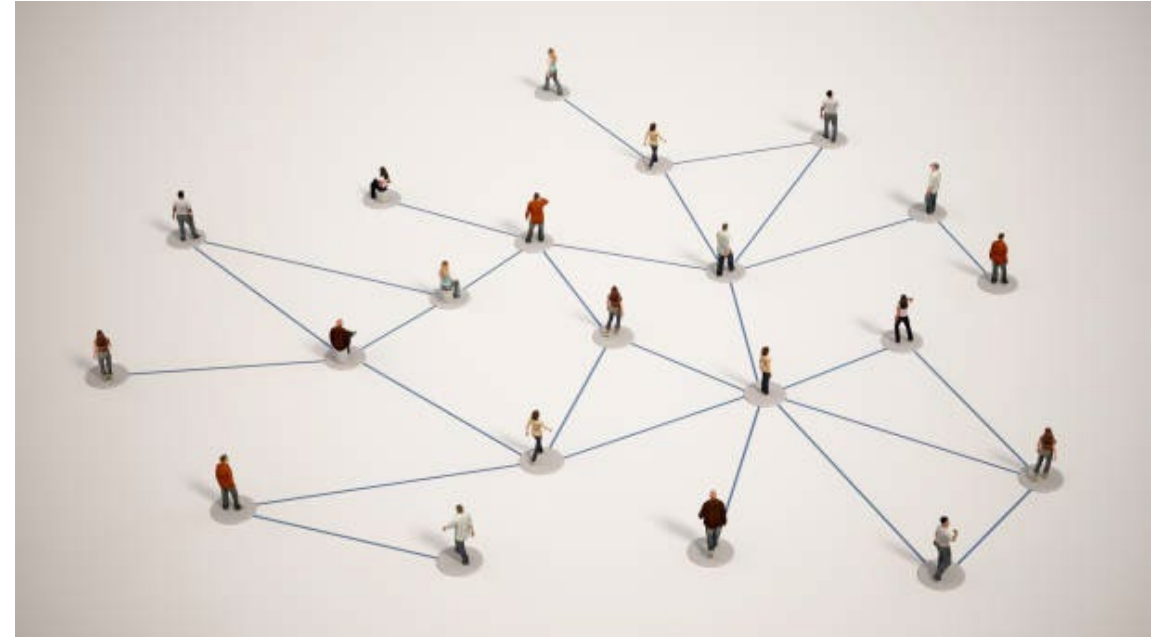
## In Practice, Shared Services:

- Consolidate functions such as **Finance, HR, IT, Payroll, Procurement, or Admin** under a single service delivery model.
- **Standardize and streamline** policies, workflows, and systems to remove duplication.
- **Leverage specialized expertise** (e.g., HR compliance, IT security, financial reporting) that small or mid-sized organizations couldn't easily afford alone.
- **Build capacity and resilience**, freeing local leaders to focus more on mission and service delivery.
- Operate under clear **governance structures and service-level agreements (SLAs)** that define accountability, cost-sharing, and performance measures.

# Common Types

The most common types of community organization shared services:

- 1 Backoffice
  - e.g. HR, Finance, IT, Admin
- 2 Shared management services
  - Shared leadership and governance, typically with back office
- 3 Front end services
  - E.g. intake, case management, client support services across the region
- 4 Purchasing & Procurement Shared Services
  - Savings from shared procurement



# How You Organize it Can Matter

The chart below summarizes the chances for achieving your goals on each model. The content is based on broad best practice research and Ontario Community Sector shared services case studies

Shared Services Model Type	Save Money	Build Capacity	Strengthen Services	Comment
<b>Internal SSO</b> <i>(one organization hosts the service within their model)</i>	L	M	M	<ul style="list-style-type: none"> <li>This rarely reduces costs</li> <li>This model often fails</li> </ul>
<b>External SSO</b> <i>(A separate legal entity is created to manage the services)</i>	L to M	M to H	M to H	<ul style="list-style-type: none"> <li>Best way to reduce risk, but still manage the outcomes</li> </ul>
<b>Outsourcing</b> <i>(You hire someone else to manage the service for you)</i>	M to H	L	M to H	<ul style="list-style-type: none"> <li>Less control than external SSO</li> <li>Less worrying about the staff</li> </ul>
<b>Hybrid</b> <i>(a creative combination of the characteristics of the above)</i>	L	Varies	Varies	

# When Are Community SSOs Worthwhile?

## Community Organization SSOs Do Well When:

- Organizations have **similar needs** and can **organize service delivery models similarly**
- The SSO provides **greater chance for improved people, processes or technology** (versus trying to achieve these on your own)
- There is an ability to **streamline and standardize processes**
- The **primary goal isn't about cost cutting**

## It helps when:

- The participating organizations have a **shared vision and values**
- The organizations **see and understand** they will be **stronger with the SSO** than on their own
- There's a clear **governance model** ensuring accountability and decision-making
- Organizations are **clear on their identity** and ability to represent their community in the arrangement

# When Are They NOT Worthwhile

## Ontario Community SSO's Have Faired Poorly When:

- A member doesn't see the need to collaborate – they feel they have **better chance to achieve the same goals but on their own**
- **Board feels it is better to support local needs** then benefit a broader definition of the word “community” (local needs outweigh community needs)
- The future state organization **doesn't have the ability to improve capacity**
  - Insufficient staff in the SSO
  - Poor leadership
  - No backstopping skills across key positions
- **Inability to staff** the model
- Inability to implement **appropriate leadership**
- Inability to **agree on streamlining or standardizing** when the time came

# My Top 3 Reasons...

## ... a Community SSO Succeeds:

- 1 It gave organizations access to people skills they wouldn't have otherwise
- 2 They quickly agreed on how to standardize
- 3 They focused on success factor(s) other than financial



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## My Top 3 Reasons....

...that Community Shared Services *DON'T* Work:

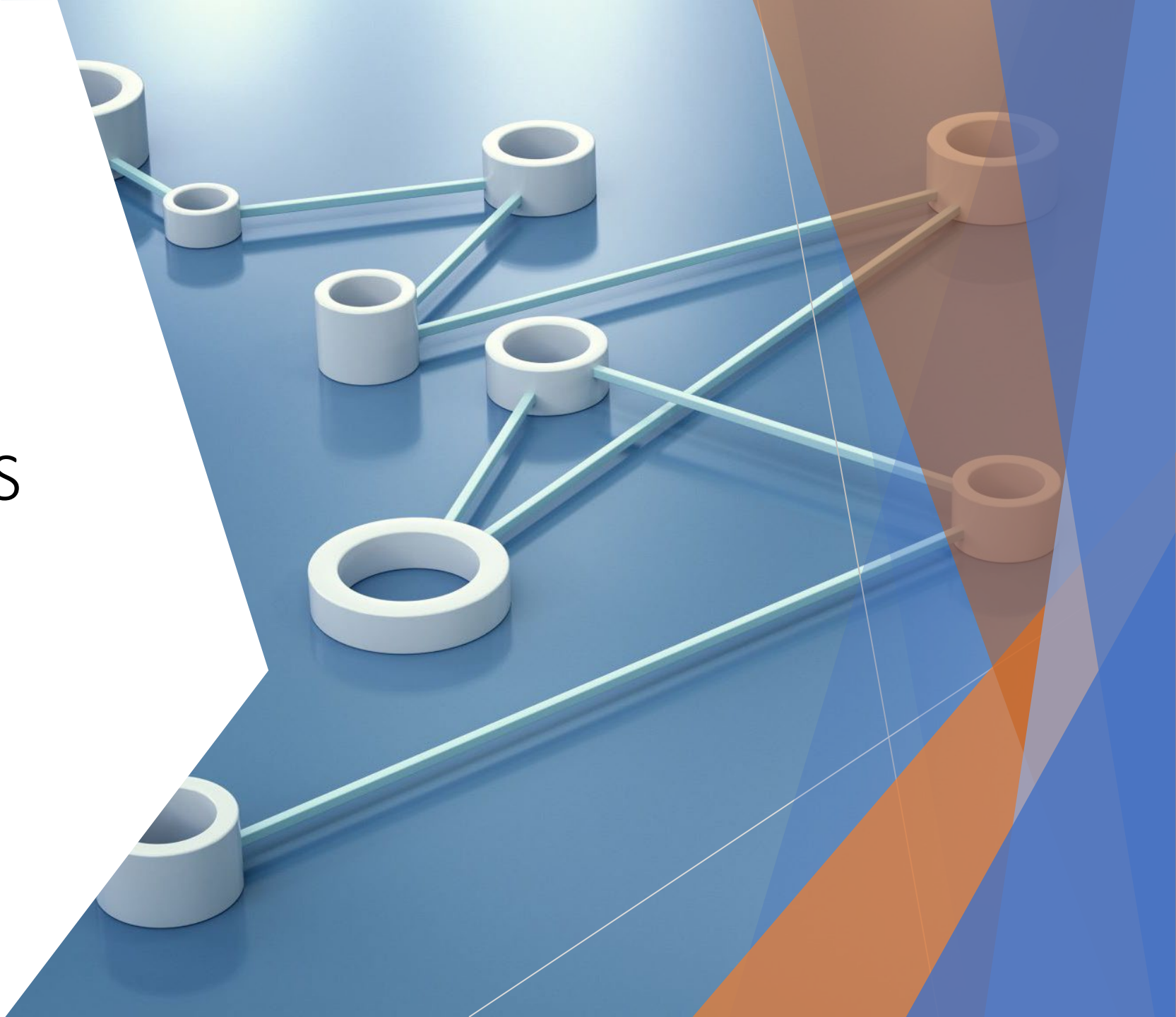
- 1 Lack of standardization
- 2 Lack/no change management
- 3 Unrealistic expectations
  - Expectation that you will have a financial ROI



# What They Don't Tell You

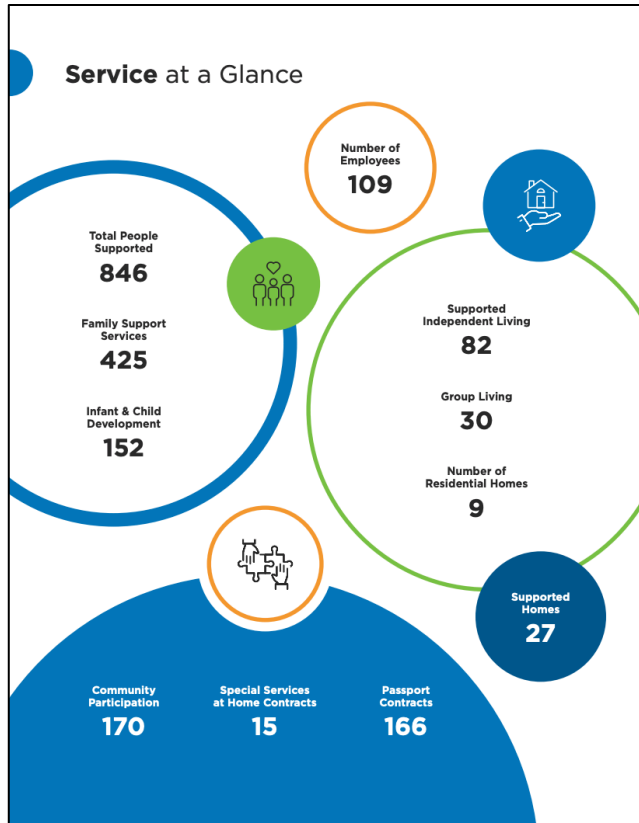
- It takes more effort than you think
- It's about money...even when it is not
- It is not easy to cut costs
- You are probably leaner right now than you think
- It costs more than you think
- The ROI is usually 7 to 10 years
- Integration and standardizing takes longer than you think
- It is the people factor, not process or technology, that makes or break it
- It is easy to feel aggrieved by another organization

TRI-ALLIANCE  
SHARED SERVICES  
ORGANIZATION

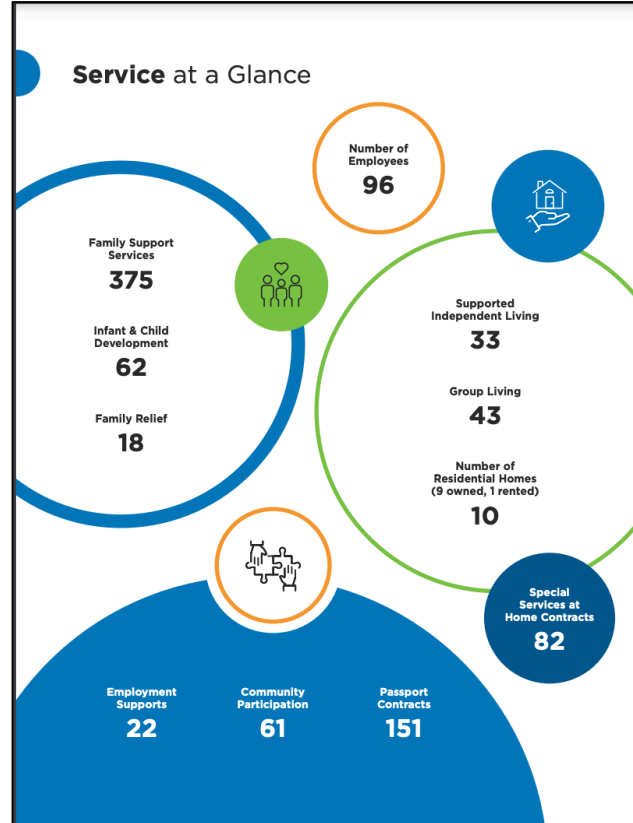


# Who We Are:

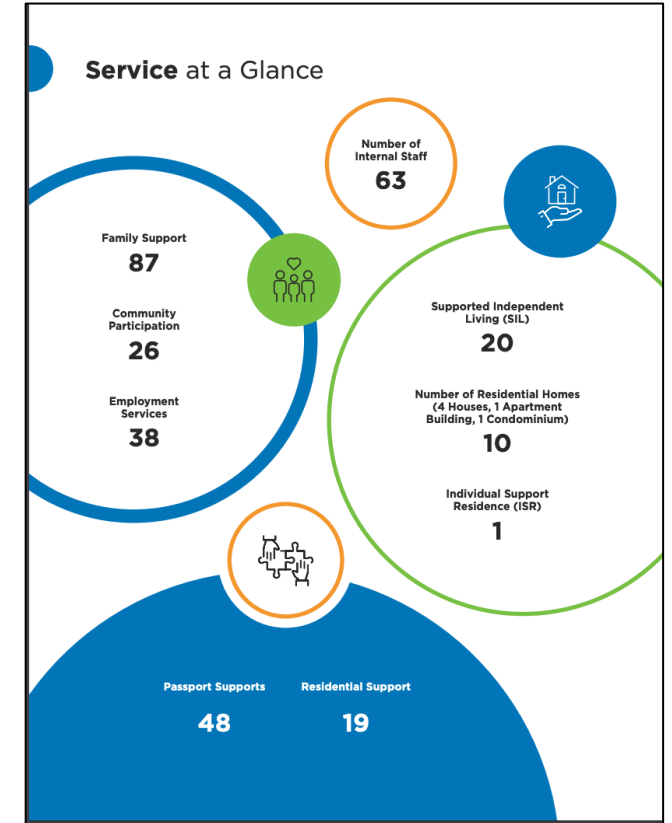
- Tri Alliance Shared Services – is comprised of the original management and administrative teams of three Community Living Agencies in the Grey Bruce Region.
  - Community Living Owen Sound and District (CLOSD)
  - Community Living Walkerton and District (CLWD)
  - Bruce Peninsula Association for Community Living (BPACL)



\$16 M Revenue



\$8.5M Revenue



\$4.8M Revenue

> 1,500 People Supported

268 Staff

\$29.3M Revenue

# Historical Perspective

Between 2010 and 2018 CLOSD, CLWD, BPACL had been working together under a shared service model. Two Executive Directors and One Director of Support Services

2010 and 2018

Nov. 2018

Building on this partnerships the Boards took a decision to deepen the arrangement in November of 2018.

Between 2019 and 2022 a group of representatives of the three boards worked with Jen Keilty-Friesen and Janeen Halliwell of People Minded Business to explore options for a more fulsome working relationship. With Brendon Pooran, from Pooran Law providing legal counsel to the working group.

2019 and 2022



To make a positive impact on the lives of people



To build on the strengths of the current model – what has worked



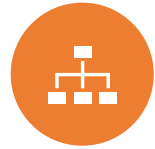
To address succession planning



To be more efficient



To be able to offer more robust/effective services



To increase the three organization's capacity to serve people, across the geographic area



To align with gov't direction and prepare for future, charting our own path.

# Criteria Considered in Process:

# Creation of Tri-Alliance Shared Services

On January 1, 2022, the Tri-Alliance Shared Services Organization began operating as an official legal entity. It is a not-for-profit charitable agency, supported by a Board of Directors comprised of two Board members from each of the three founding members.

Each Agency contracts with Tri Alliance to provide Management and Back Office Services. (Senior Leadership, Finance, Support Services, Human Resources, Property Management, IT and other administrative office functions of the three agencies)

Each of the agencies continues to be a separate legal entity with its own Board Of Directors and contracts with MCCSS and other funders.

All Managers and Admin Staff that were employees of CLOSD, BPACL, and CLWD became employees of Tri-Alliance. 27 people in total were impacted

# How it all Works



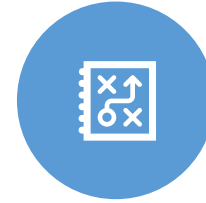
EXECUTIVE  
LEADERSHIP



SUPPORT SERVICES



FINANCE



IT



HUMAN  
RESOURCES



COMMUNICATIONS



PROPERTY  
MANAGEMENT

# How it All Works – Executive Leadership

## Staffing:

- One Chief Executive Officer
- One Chief Operations Officer
- (One Executive Administrator)

## Oversight:

- CEO supports five Board of Directors - three agencies, Tri Alliance and one Foundation
- COO oversees all operational matters
- (EA supports work of all boards, the CEO and the COO)



# How it All Works –Finance

## Staffing

- One Director of Finance
- 2 Senior Financial Analysts
- 2 Accounts Payable/Receivable
- 1 Manager of Payroll and Benefits

## Systems Used:

- Adagio
- Paydirt
- Go Easy

## Mechanics:

- Employees work in home locations
- Employees can access information remotely
- Employees can cover for others work during absences
- Financial Reporting is consistent in all four agencies
- Policies and Procedures are aligned and consistent



# How it All Works – Support Services

## Staffing:

- One Director of Support Services
- Multiple Managers Supporting All Three Communities
- One Manager of Quality Assurance and Policy Development
- Passport Department – Manager, Admin

## Systems:

AIMS (with the TIMMS package to support Passport)



# How it All Works –Human Resources

## Staffing:

- One Director of People and Culture
- One HR Coordinator – with focus on Recruitment

## Centralized Support:

- Centralized recruitment
- Interviews by front line supervisors/managers in each community
- Coordinated orientation – hope to work towards a centralized orientation
- Creation of HR resources and development opportunities for all agencies
- Coordinate LR support for collective bargaining and labour relations matters
- Coordinated Policies and Procedures



# How it All Works – Communications/IT/PM

## Communications

- Centralized Support:
- All websites overhauled and Managed Centrally
- All social media platforms created – each agency staff post social media content
- Centralized Policies and Procedures
- Newsletter committees in each location, coordinated by Manager
- Community Events organized and supported by Manager

## IT:

- Executive Administrator manages the IT support and relationship with vendor
- Implemented a centralized ticketing system for IT support

## Property Management

- One Manager
- Three Maintenance person – one in each community
- Implemented a centralized ticketing system for maintenance requests
- Centralized quarterly reporting



# Benefits

CREATED EFFICIENCIES AND IMPROVED EFFECTIVENESS

CREATED DEEPLY SKILLED POSITIONS IN REQUIRED FIELDS TO SUPPORT THE BUSINESS SIDE OF OPERATIONS.

REDUCED DUPLICATION OF MANY TASKS

ALIGNED FINANCIAL MANAGEMENT TASKS AND EXPANDED THE USE OF TECHNOLOGY, WITH THE ABILITY TO COMPLETE THE WORK CENTRALLY OR REMOTELY.

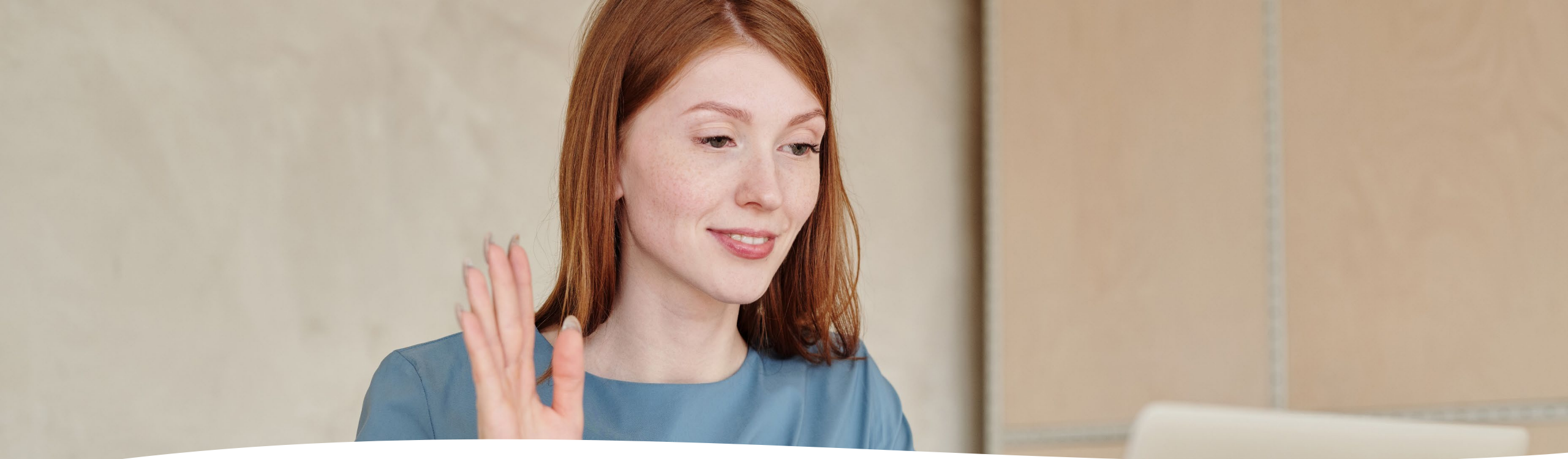
COMBINED, WE HAVE A STRONGER VOICE

# Challenges

- A long slow process of change – we did not reorganize roles, with a few exceptions, people remained in their existing positions.
- With every retirement or resignation, there was a reorganization and this sometime was very confusing to the front-line staff in each community.
- Unexpected turnover in staffing created some stressful and challenging times
- We did this in the midst of the pandemic
- Change is hard.

# Contributors to Success:

- Three agencies with a long-standing relationship of working together under a shared service agreement for senior leadership
- BOD's who understood the importance and the necessity of creating a shared service model, were governance boards, had high levels of trust in the process and had confidence in the working group
- Really good consultants and legal counsel – People Minded Business, and Pooran Law – were such important partners in the process
- A long slow process of change – (you will find this on the Challenges slide as well)
- Excellent alignment in exiting processes – governance, P&P, systems etc.
- Several key position held by individuals who were about to retire allowed for a reorganization
- Everyone was committed to the process – even though there was an escape clause after three years, no agency has expressed dissatisfaction.
- Provided regular updates on the success both to the Board and Front Line staff – articulating the value in the partnership. Tangible and measurable positive outcomes.
- Commitment that Communities would retain their individuality in their communities.



**Thank You!**

**More questions, comments or ideas?**

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