



BLACKLINE  
CONSULTING

A Higher Standard

# Organizational Review

**Town of Orangeville**

**Council Presentation**

November 2023

# Agenda



# Context (1/2)

Your Objective – The Town is experiencing growth and needs a plan for how best to manage it, our review covers:

**Identifying common practices and key performance indicators**

**Identifying improvements to processes**

**An implementation plan to achieve these recommendations**

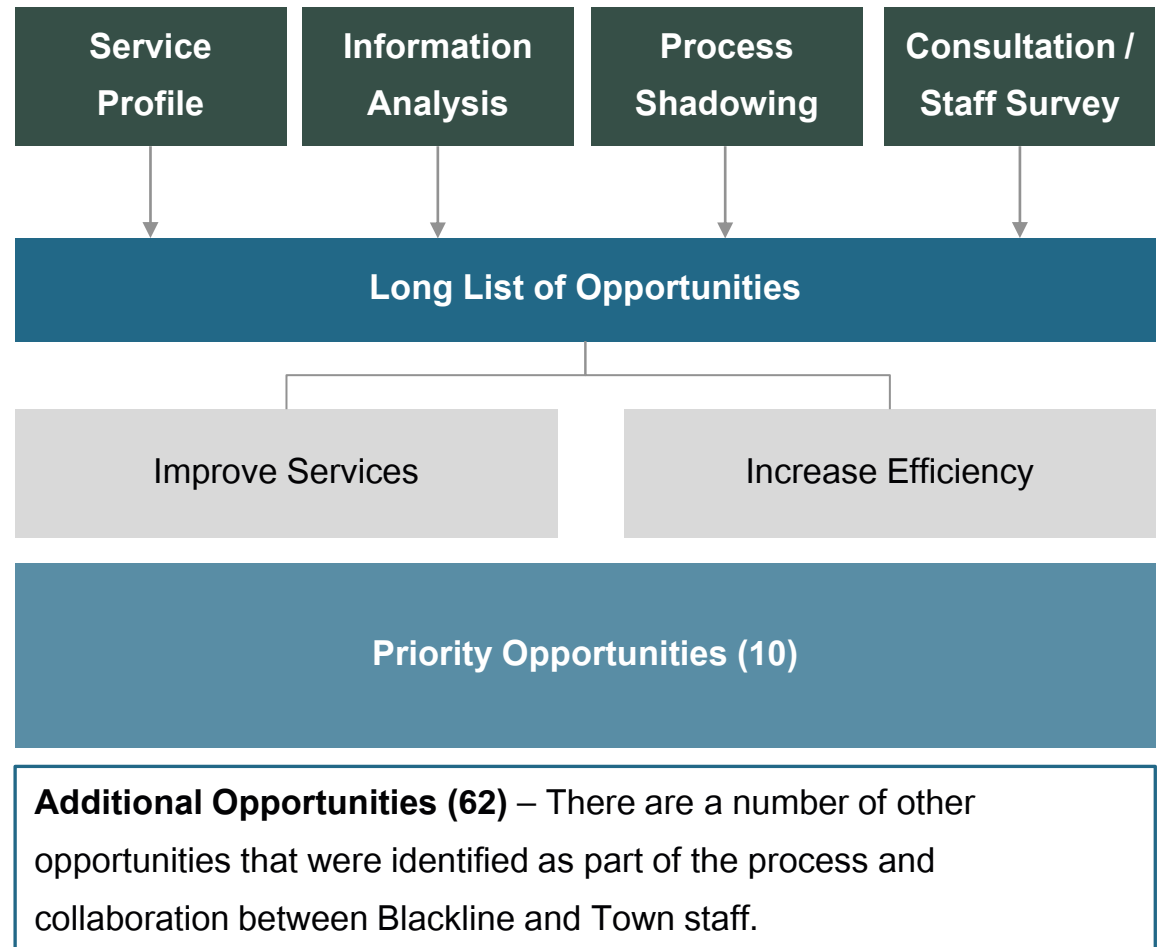
**Determining service delivery (internal/external) resources**

**A staffing plan for the next five years**

**A methodology to review staff and compensation needs**

## Context (2/2)

- ▶ Our approach was by design highly collaborative
- ▶ We use a number of different sources to analyze the organization
- ▶ Thanks - to management and staff for your participation



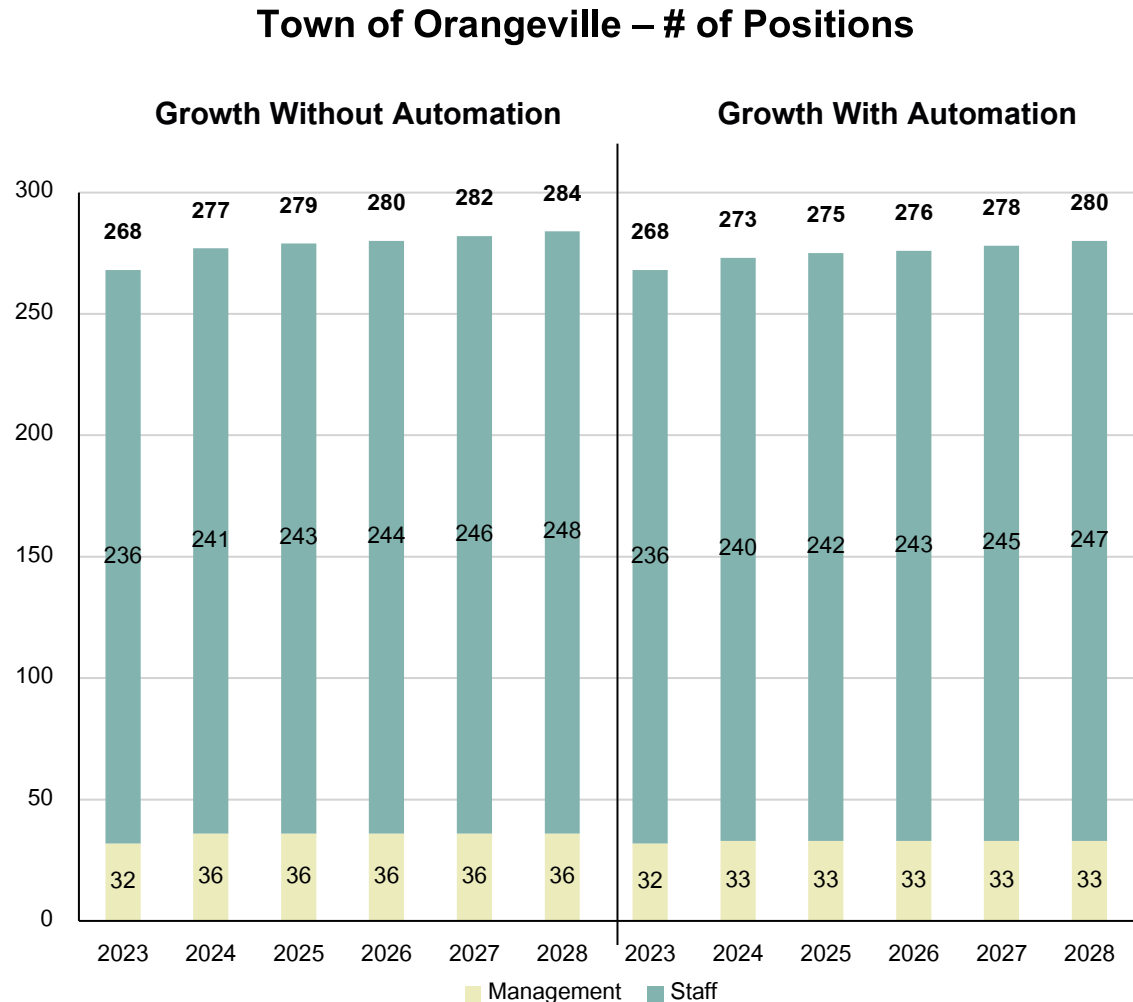
# Forecast (1/2)

- ▶ The Town may see slight growth changes over the next five years
- ▶ These changes will impact services (however unequally)
- ▶ We use these growth figures to forecast staffing implications

Variable	Change by 2028	Examples of Services Affected*
<b>Population</b>	↑4.5%	<ul style="list-style-type: none"> <li>▶ Customer service</li> <li>▶ Parking and bylaw enforcement</li> <li>▶ Community engagement</li> <li>▶ Recreation programming</li> </ul>
<b>Households</b>	↑4.5%	<ul style="list-style-type: none"> <li>▶ Tax and utilities</li> <li>▶ Water and wastewater</li> <li>▶ Fire services</li> <li>▶ Building and planning</li> </ul>
<b>Roads</b>	↑3.6%	<ul style="list-style-type: none"> <li>▶ Snow clearing</li> <li>▶ Road maintenance</li> <li>▶ Design and construction</li> <li>▶ Traffic operations</li> </ul>
<b>Outdoor Recreation Space</b>	↑2.7%	<ul style="list-style-type: none"> <li>▶ Outdoor / facility maintenance</li> <li>▶ Trail planning, operations</li> <li>▶ Design and construction</li> </ul>
<b>Indoor Recreation Space</b>	↑1.7%	<ul style="list-style-type: none"> <li>▶ Indoor space facility maintenance</li> <li>▶ Facility booking</li> </ul>

# Forecast (2/2)

- ▶ Forecast is predicated on maintaining current service standards
- ▶ It suggests marginal increases over the next five years
- ▶ Technology will continue to be an important lever






Note: Management includes directors, managers and supervisors.




We use positions rather than Full-time Equivalents (FTEs) as to provide flexibility, specifically the capacity and capability needs.

# Our Observations

The Town's organizational structure is reasonable therefore, the Town should continue to focus on modernizing how it delivers services

Structure	Staffing	Delivery
		
<ul style="list-style-type: none"><li>▶ The Town's structure allows for scaling in the future without any significant restructuring.</li><li>▶ As with other municipalities, there were cases where supervisory positions have low spans. However, as the Town grows many of these should improve.</li></ul>	<ul style="list-style-type: none"><li>▶ The Town is operating a highly flexible delivery model and should continue with it.</li><li>▶ The overtime spend is not indicative of systemic labour shortages.</li><li>▶ Opportunities may exist to explore shared services.</li></ul>	<ul style="list-style-type: none"><li>▶ The Town operates without defined service expectations.</li><li>▶ Services are highly manual and paper-based</li><li>▶ Coordination and communication between levels and departments in the organization can be improved.</li></ul>




# Opportunities (1/5)

Recommendation	Benefits	Cost*
 <p><b>1. Implement a Service Level Framework</b> – The Town should define resident expectations and establish performance measures / service levels.</p>	<ul style="list-style-type: none"> <li>▶ Ability to measure performance and quantify the impact of growth or changes in service levels.</li> <li>▶ Improve the Town's ability to forecast staffing needs.</li> </ul>	<p>\$\$\$</p>
 <p><b>2. Implement a Customer Service Framework</b> – Develop and implement a customer service framework to standardize customer service across the Town.</p>	<ul style="list-style-type: none"> <li>▶ Improve the resident experience.</li> <li>▶ Streamlines processes, making it easier for Town staff to handle inquiries and resolve issues efficiently.</li> </ul>	<p>\$\$</p>
 <p><b>3. Enhance the Town's Approach to Project Prioritization</b> – Include guidelines and structure for resource capacity analysis as part of the Town's project prioritization process.</p>	<ul style="list-style-type: none"> <li>▶ Improve resource management across the Town.</li> <li>▶ Improve communication and organizational alignment of staff and priorities.</li> </ul>	<p>\$</p>

\* Indicative cost estimates that considers one-time costs (including internal/external resources) to perform initiative \$=1k-50k, \$\$=51k-100k, \$\$\$=100k+.





# Opportunities (2/5)

Recommendation	Benefits	Cost*
 <p><b>4. Develop an IT Master Plan</b> – Develop an IT Master Plan to address system / data gaps and enhance automation.</p>	<ul style="list-style-type: none"> <li>▶ Enhance operational efficiency by better use of technology.</li> <li>▶ Future-proof the Town's technology – help ensure the Town's technology remains up-to-date.</li> </ul>	<p>\$\$\$</p>
 <p><b>5. Establish System Owners</b> – Establish a formal process to designate system owners. Revise the Town's IT governance to include these roles and responsibilities.</p>	<ul style="list-style-type: none"> <li>▶ Improve staff productivity by ensuring systems are fit-for-purpose.</li> <li>▶ Improve resident experience – systems that automate activities.</li> </ul>	<p>\$</p>
 <p><b>6. Enhance Payroll Automation</b> – Automate the payroll process by streamlining process activities, reconfiguring the system and integrating payroll with other key systems.</p>	<ul style="list-style-type: none"> <li>▶ Improve staff and management productivity by reducing manual steps.</li> <li>▶ Ensure the Town's current systems and process activities are fit for purpose.</li> </ul>	<p>\$\$</p>



\* Indicative cost estimates that considers one-time costs (including internal/external resources) to perform initiative \$=1k-50k, \$\$=51k-100k, \$\$\$=100k+.

# Opportunities (3/5)

Recommendation	Benefits	Cost*
 <p><b>7. Digitize and Automate Approval Processes</b> – Automate approval processes where possible by implementing an electronic signature tool.</p>	<ul style="list-style-type: none"> <li>▶ Modernize workflows, increasing productivity and reducing the amount of paper.</li> <li>▶ Reduce physical space for storing paper.</li> </ul>	<p>\$\$</p>
 <p><b>8. Digitize Historical Permits and Inspection Data</b> – Implement a method to access historical permits and inspections data.</p>	<ul style="list-style-type: none"> <li>▶ With historical data in a retrievable format, Building Services staff will not have to spend extra time finding the information.</li> <li>▶ Improve response times for answering resident inquiries.</li> </ul>	<p>\$\$</p>

\* Indicative cost estimates that considers one-time costs (including internal/external resources) to perform initiative \$=1k-50k, \$\$=51k-100k, \$\$\$=100k+.

# Opportunities (4/5)

Recommendation		Benefits	Cost*
	<b>9. Develop a Data Strategy</b> – Develop a data strategy to implement a Business Intelligence (BI) and Data Warehouse (DW) platform.	<ul style="list-style-type: none"> <li>▶ Establish a culture of data driven decision-making.</li> <li>▶ Reduce burden on staff to search for information and make corrections.</li> </ul>	\$\$\$
	<b>10. Develop a Fleet Management Plan</b> – The Town should develop a Fleet Management Plan and determine the most appropriate ownership model.	<ul style="list-style-type: none"> <li>▶ Initial estimates indicate a positive case for changing to an ownership model.</li> <li>▶ Better oversight of the Town's fleet.</li> <li>▶ More predictable forecast of Town fleet needs and expenses.</li> </ul>	\$

\* Indicative cost estimates that considers one-time costs (including internal/external resources) to perform initiative \$=1k-50k, \$\$=51k-100k, \$\$\$=100k+.

# Opportunities - Implementation Plan (5/5)

Recommendation	2024		2025		2026	
	H1	H2	H1	H2	H1	H2
1. Implement a Service Level Framework						
2. Implement a Customer Service Framework						
3. Enhance the Town's Project Prioritization						
4. Develop an IT Master Plan						
5. Establish System Owners						
6. Enhance Payroll Automation						
7. Digitize and Automate Approval Processes						
8. Digitize Historical Permits / Inspection Data						
9. Develop a Data Strategy						
10. Develop a Fleet Management Plan						

\*H1 refers to the first half of the year, H2 to the second half of the year

# Measuring Performance

There are some measures we recommend the Town adopt:

Category	Key Performance Indicators*
Efficiency	<ul style="list-style-type: none"> <li>▶ <b>Customer Service:</b> Percentage of inquiries (via phone, email, etc.) returned within two days.</li> <li>▶ <b>Permits:</b> Average time to get approval on permits.</li> <li>▶ <b>Workforce expense:</b> Labour and contracting services / household.</li> </ul>
Effectiveness	<ul style="list-style-type: none"> <li>▶ <b>Resident Engagement:</b> Number of residents subscribed to Town social media accounts, newsletters, and mailing lists.</li> <li>▶ <b>Asset Management:</b> Debt to reserve ratio.</li> <li>▶ <b>Recreation:</b> Total participant hours for recreation programs / 1000 residents.</li> </ul>
Transparency	<ul style="list-style-type: none"> <li>▶ <b>Access to Information:</b> Number of Freedom of Information (FOI) Requests processed within a given year and time to process the request.</li> <li>▶ <b>Strategic Alignment:</b> Progress of corporate initiatives.</li> <li>▶ <b>Resident Satisfaction:</b> Resident sentiment – pulse survey YoY** performance.</li> </ul>

\*Selection from the report – not the complete list.

\*\* Year over Year

# Conclusion

1	▶ The Town is well positioned for growth (from an organizational structure perspective), however there are some areas that require immediate staffing investments (2024)
2	▶ The organization should continue to focus on modernizing its ability to deliver services
3	▶ Adopting a service level framework and key performance indicators will help the Town manage growth and its impact on services

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