Organizational Review – Managing Future Growth

Town of Orangeville

Final

November 2023

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/ CONTEXT

Context (1/3)

Background

The Town of Orangeville (“Town”, “you” or “Orangeville”) is a vibrant community of 30,000 and is located at the northwest edge of the Greater Toronto Area (“GTA”) at the intersection of Provincial Highway 10 and Dufferin County Road 109 (“Broadway”). Centrally located, Orangeville provides access to key markets and connections. The Town's small-town charm and big city amenities create a balanced lifestyle that appeals to both workers and entrepreneurs.

Objective

The Town has asked for an Organizational Review. The objective of this review is to help ensure the Town’s service delivery is fit for purpose to manage future growth.

Scope

The scope of this review includes:

1	2	3
Evaluate services and service levels	Assess the sustainability of your current resources and organizational structure	Develop recommendations to manage growth and achieve greater efficiencies

Approach

Our approach was by design while collaborative, analyzing not only data and information but also included significant stakeholder consultation. At the onset of the engagement, we worked with the Town’s Senior Leadership Team (“SLT”) to develop a communication plan to keep staff abreast of the “what, how and why”.

During the engagement we conducted 48 consultations with close to 80 participants, received an additional 124 staff surveys and led 13 opportunity sessions.

Context (2/3)

Orangeville's organizational structure and service delivery is reasonable, but we have identified some areas for improvement

Blackline uses several sources of information to identify observations.

Structure	Staffing	Delivery
		
▸ The Town's structure (use of General Managers) is an improvement from the previous. It allows for scaling in the future without any significant restructuring. ▸ There are as with other municipalities, cases where supervisory positions have low spans. However, as the Town grows many of these should improve.	▸ The Town is operating a highly flexible delivery model and should continue with it. ▸ The overtime spend is not indicative of systemic labour shortages. ▸ Some opportunities exist to explore shared services, but each should be assessed on a case-by-case basis.	▸ The Town operates without defined service expectations. ▸ Analyzing your service levels indicates some linkage with your strategic plan. ▸ Services are highly manual and paper-based, which means the Town has opportunities to increase automation. ▸ Coordination and communication between levels and departments in the organization can be improved.

Based on our analysis, it is evident that, for the Town to efficiently manage growth it should continue to focus on modernizing how it delivers services with redesigning processes and technology adoption.

Context (3/3)

Forecasts are not determinative, rather, they are tools to inform decision-making

- Blackline created growth projections for the Town on four distinct variables of interest: overall population, households, roads and outdoor recreation space. Indoor recreation space is identified as an important variable to monitor but is not a factor in the growth projection analysis.
- Each growth projection variable has a relationship with distinct services that the Town provides to residents, businesses and other stakeholders. Example services are given in the table to the right.
- Growth in management positions includes those with supervisory responsibilities, such as directors, managers and supervisors.
- These growth projections are based on current conditions and past trends, but the future of Orangeville will be determined by the choices and decisions made by individuals, households and governments reacting to social, environmental, economic and political factors.

Variable	Change by 2028	Examples of Services Affected*
Population 	↑4.5%	▸ Customer service ▸ Parking and bylaw enforcement ▸ Community engagement ▸ Recreation programming
Households 	↑4.5%	▸ Tax and utilities ▸ Water and wastewater ▸ Fire services ▸ Building and planning
Roads 	↑3.6%	▸ Snow clearing ▸ Road maintenance ▸ Design and construction ▸ Traffic operations ▸ Procurement
Outdoor Recreation Space 	↑2.7%	▸ Outdoor space / facility maintenance ▸ Trail planning, operations and maintenance ▸ Design and construction ▸ Procurement
Indoor Recreation Space 	↑1.7%	▸ Indoor space facility maintenance ▸ Facility booking

*Not an exhaustive list of services

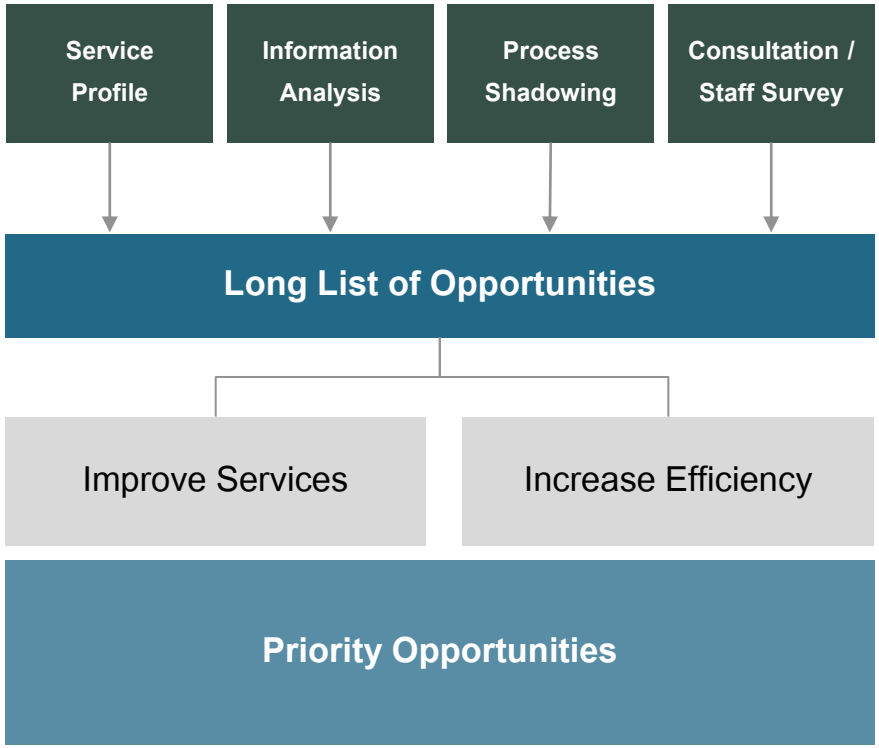
/ EXECUTIVE SUMMARY

Executive Summary – Recommendations (1/3)

Our approach for developing opportunities was highly collaborative and uses many different sources and approaches

- **Service Profiles** – we conducted an analysis of service profiles and identified opportunities.
- **Our Analysis** – we conducted an analysis of various data and information provided by the Town. In addition, we have drawn from our previous experiences and knowledge conducting service reviews where applicable.
- **Process Shadowing** – we met with staff and performed "ride alongs" to see what they do and how they do it. This provides richer insights into how the Town operates.
- **Consultation/Staff Survey** – through interviews (group and 1-on-1) we met with management and staff. For those we were unable to meet with there was a staff survey to provide us with their views and opinions. Additionally, we held co-design opportunity sessions to have staff give their perspective on which opportunities have more merit.

There is a total of 72 opportunities, 10 of which are high priority. The Recommendation section includes more details of each high priority opportunity. The remaining 62 opportunities are identified in Appendix A.



Additional Opportunities – There are a number of additional opportunities that the Town may wish to implement at its own discretion. These opportunities were identified as part of the process and collaboration between Blackline and Town staff.

Executive Summary – Recommendations (2/3)

The below ten recommendations (in no particular order) will help the Town to continue to modernize and manage growth efficiently.

Recommendation		Benefits	Period Start*	Cost**
	**1. Implement a Service Level Framework** – The Town should define resident expectations and establish performance measures / service levels.	▸ Ability to measure performance and quantify the impact of growth or changes in service levels. ▸ Improve the Town's ability to forecast staffing needs.	2024-H1	$$$
	**2. Implement a Customer Service Framework** – Develop and implement a customer service framework to standardize customer service across the Town.	▸ Improve the resident experience. ▸ Streamlines processes, making it easier for Town staff to handle inquiries and resolve issues efficiently.	2024-H2	$$
	**3. Enhance the Town's Approach to Project Prioritization** – Include guidelines and structure for resource capacity analysis as part of the Town's project prioritization process.	▸ Improve resource management across the Town. ▸ Improve communication and organizational alignment of staff and priorities.	2024-H2	$
	**4. Develop an IT Master Plan** – Develop an IT Master Plan to address system / data gaps and enhance automation.	▸ Enhance operational efficiency by better use of technology. ▸ Future-proof the Town's technology – help ensure the Town's technology remains up-to-date.	2024-H2	$$$
	**5. Establish System Owners** – Establish a formal process to designate system owners. Revise the Town's IT governance to include these roles and responsibilities.	▸ Improve staff productivity by ensuring systems are fit-for-purpose. ▸ Improve resident experience – systems that automate activities.	2024-H1	$

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

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

Executive Summary – Recommendations (3/3)

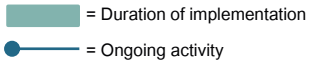
Recommendation		Benefits	Period Start*	Cost**
	**6. Enhance Payroll Automation** – Automate the payroll process by streamlining process activities, reconfiguring the system and integrating payroll with other key systems.	► Improve staff and management productivity by reducing manual steps. ► Ensure the Town's current systems and process activities are fit for purpose.	2024-H1	$$
	**7. Digitize and Automate Approval Processes** – Automate approval processes where possible by implementing an electronic signature tool.	► Modernize workflows, increasing productivity and reducing the amount of paper. ► Reduce physical space for storing paper.	2024-H2	$$
	**8. Digitize Historical Permits and Inspection Data** – Implement a method to access historical permits and inspections data.	► With historical data in a retrievable format, Building Services staff will not have to spend extra time finding the information. ► Improve response times for answering resident inquiries.	2024-H1	$$
	**9. Develop a Data Strategy** – Develop a data strategy to implement a Business Intelligence (BI) and Data Warehouse (DW) platform.	► Establish a culture of data driven decision-making. ► Reduce burden on staff to search for information and make corrections.	2025-H1	$$$
	**10. Develop a Fleet Management Plan** – The Town should develop a Fleet Management Plan and determine the most appropriate ownership model.	► Initial estimates indicate a positive case for changing to an ownership model. ► Better oversight of the Town's fleet. ► More predictable forecast of Town fleet needs and expenses.	2024-H1	$

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

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

Executive Summary – Implementation Roadmap

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 Approach to 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 and Inspection Data*						
9. Develop a Data Strategy						
10. Develop a Fleet Management Plan						



This proposed implementation plan takes into consideration urgency, dependencies and estimated effort. The timeline is contingent on resource availability. 2024 will inevitably be another unpredictable year given the Canadian economy. As such, we recommend that following acceptance of this report, the Town considers the above as more of a sequence of projects rather than a definitive implementation plan. We also recommend that SLT further validate the supporting assumptions, develop more detailed work plans and budgets for the recommendations that they deem appropriate.

*Should align with the Town's current plans to implement a Building / Planning system.

/ RECOMMENDATIONS

Recommendations – Introduction

There are 10 priority opportunities the Town should consider implementing

The table to the right lists the priority opportunities. This is a subset of the total opportunities that were identified as part of this review – see Appendix A.

The following pages provide a description of each of the top priorities describing:

- **Situation** – describes the current state
- **Recommendation** – the recommendation statement
- **Steps** – the actions the Town should follow to implement the opportunity
- **Benefits** – the potential advantages of implementing the opportunity
- **Risks** – potential risks relating to the opportunity

	**1. Implement a Service Level Framework**
	**2. Implement a Customer Service Framework**
	**3. Enhance the Town's Approach to 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 and Inspection Data**
	**9. Develop a Data Strategy**
	**10. Develop a Fleet Management Plan**

#1 – Implement a Service Level Framework (1/2)

Current Situation

Our analysis indicates that the Town's service level management is not well defined. For example, there are several legislated services that either do not have a service level or did not have a definition. This finding is also applicable to discretionary services, although this is more common with most other municipalities.

- The absence of service levels and performance measures can make it difficult for the Town to indicate their performance (good or bad) other than completion of activities.
- Moreover, this may limit the Town's ability to make informed workforce decisions such as increasing staff headcount or changing the complexion (full-time, part-time, seasonal).
- It can also make it challenging to model changes relating to process, adoption of new technology or increasing service levels.

Recommendation

The Town should define resident expectations and establish performance measures and service levels.

Step 1: Conduct a Community Needs Assessment

- The first step is to understand the specific needs and expectations of residents and the community at large regarding the Town's services.
- Develop a stakeholder engagement plan, which outlines the scope of engagement, and key stakeholder groups within the community such as residents, businesses and advocacy groups. The engagement plan should incorporate a variety of approaches to gather information, including surveys, focus groups or interviews. The lines of inquiry should focus on identifying the priorities, what has worked well and areas for improvement.

Step 2: Identify Service Levels and Measures

- Use the community needs assessment to inform priority services and expectations. This data will help the Town create Key Performance Indicators (KPIs) to measure service performance. We have identified potential KPIs for the Town to consider in the Key Performance Indicators section of the report.
- Additionally, the Town has a corporate strategic plan and should consider linkage between it and KPIs.

#1 – Implement a Service Level Framework (2/2)

Step 3: Determine Measurement Needs

- Once the Town determines its service levels and KPIs it should assess the extent to which it can efficiently gather the supporting data, analyze it and report it.
- This may have dependencies on the systems the Town has in place. Some measures may be the right ones to use, but it will be an onerous task to track and report on them. Therefore, the Town should re-prioritize its service levels and KPIs to focus on what it can report.

Step 4: Develop Baselines and Targets

- At this point the Town has a list of priority service levels and KPIs that it is able to report. Now it needs to create a baseline – the current performance that the Town is achieving. Using the baseline and internal discussion the Town should then set targets. This may be in conjunction with Council depending on the measures. For example, if the KPI is Staff Safety: Total number of employee incidents / 100 employees and the current baseline is 3, the target might be 1. This requires analysis of the changes that the Town will implement and the impact you expect it will have on the KPI.

Step 5: Implement New Processes / Activities

- With each service level and KPI there may be new activities to support the data gathering, analyzing and reporting. The Town should outline the timing of those activities, ownership of the responsibilities and source of data.
- The Town should also consider creating a dashboard that the Senior Leadership Team and Council can use that includes the various measures.

Step 6: Measure and Optimize

- Once established, the Town should agree on a set frequency (no less than once a year) to review existing service levels and KPIs. The intent of the review is to determine if they are still valid (including the target).

Benefits

- Ability to measure performance and quantify the impact of growth or changes in service levels.
- Improve staff forecasting.

Risks

- Departments may not have the information readily available and data gathering and reporting becomes a manual, time intensive activity.

#2 – Develop a Customer Service Framework (1/2)

Current Situation

As the Town continues to grow it will likely need to formalize customer services. While there is currently a policy for accessibility standards in customer service, the Town does not have a customer service policy.

- Currently, Customer Service Representatives (CSRs) receive training to answer departmental specific inquiries. Different areas use different systems which makes it challenging to have broad knowledge of a customer's experience and history with the Town.
- The Town may wish to pursue centralizing customer service, however as a precursor to this, it can focus on establishing a customer service framework for all divisions.

Recommendation

Develop and implement a customer service framework to standardize customer service across the Town.

Step 1: Create a Customer Service Policy

- Create a customer service policy to define the Town's commitment to customer experiences, outlining the standards, processes and expectations to guide all customer interactions.
- As per of the previous opportunity, establish customer service levels. Some service levels to track include:
  - Time to respond to requests
  - Time to resolve requests and mark as closed
  - Number of cross-departmental transfers
  - Transfer wait times
- The policy should define what is customer service versus what is staff delivering work. For example, some municipalities will define responding to a request to fix a pothole as customer service, whereas the work to fill the pothole is staff delivering work.
- Consider defining standard customer service processes with these six types of interactions in mind:

#2 – Develop a Customer Service Framework (2/2)

Step 3: Develop and Implement Customer Service Staff Resources

- Due to the Town size, we recommend customer service remains decentralized and focus on improving customer resolution (on first contact) and customer transfers. Therefore, during this step, the Town should concentrate on providing guidance, training and resources to staff involved in customer service. This includes developing knowledge articles, decision trees (for routing customer transfers) and FAQ's. This will help ensure staff are better equipped for managing customer service interactions.
- Define how to handle transfers between divisions. Consider the roles and responsibilities of individuals in the customer transfer process. This captures both the division initiating the transfer and the receiving division, ensuring accountability at each activity.
- The Town should also consider the underlying technology. There may be opportunities to automate certain activities using the Microsoft suite or functionality in the Town's current CRM, phone system and website. Based on Blackline's experience system integration can also be quite helpful to improve the customer experience. Below are the most common CRM integrations:

Geographic Information System (GIS) (e.g. Esri)	Work order and asset management system
Permitting system	Recreation system (e.g. Xplor Rec.)

Step 4: Implement Improvement and Feedback Loop

- Set up a method for collecting, analyzing, and acting upon customer feedback. Collect insights through regularly scheduled surveys and post-interaction evaluations.

Step 5: Determine When to Centralize Customer Service

- In the future, the Town should consider centralizing customer service. This is typically dependent on population growth and work volume (annual customer service calls, emails, walk-ins, mobile app, etc.)
- Based on a peer analysis that Blackline led recently, most municipalities suggest centralizing in phases (either by division or service). This allows time for change adoption to occur and minimize and customer service disruption.

Benefits

- Improved resident experience.
- Streamlines processes, making it easier for Town staff to handle inquiries and resolve issues efficiently.

Risks

- There is a risk of poor compliance by operating divisions. The Town will need to provide communication and training to staff to support adoption of the framework in practice.
- If the framework becomes too rigid and inflexible, it may hinder the ability to adapt to changing customer needs, emerging technologies, or unforeseen circumstances.

#3 – Enhance the Town's Approach to Project Prioritization (1/2)

Current Situation

The Town's project prioritization does not include detailed resource capacity analysis. Therefore, it is difficult to determine whether the Town can complete those priorities with its existing resources. In addition, during the year emerging priorities will occur, compounding the issue.

The largely top-down process has worked reasonably well, but challenges to meet future demands will become increasingly difficult as the Town grows.

Recommendation

Include guidelines and structure for resource capacity analysis as part of the Town's project prioritization process.

Step 1: Define Demand and Supply

- The Town should align its current approach to setting the annual budget with a structure that allows it to assess different types of demand and the resource requirements to deliver them. See the Annual Review Process as an example. Typically, this will include strategic demand, departmental demands and operational demands. Some will require one-time effort while others will require ongoing. A common pitfall when assessing one-time demand e.g. projects is that it lacks consideration for ongoing staffing needs both directly to the departments responsible for the services as well as any supporting areas e.g. IT.

Step 2: Establish a Prioritization Framework

- Revise the Town's prioritization framework. This should consider several criteria as it has a broad range of projects to assess (from internal corporate initiatives to capital infrastructure). Below are some example criteria the Town may wish to use:
  - Business value (tangibility / intangible)
  - Beneficiaries (which stakeholder groups will benefit from this work)
  - Costs (one-time, ongoing)
  - Legislative / regulatory need
  - Achievability (capacity and capability of the Town)
  - Complexity of the project (something the Town has experience with or is it net new)
  - Urgency of the project
  - Availability of funding
- Using the above (or a combination thereof), the Town should create an easy-to-use Excel template for collating the initiatives details and later for ranking. The framework should also consider assigning a weigh for each criterion. For example, if a project is legislated it may have an automatic high score.

#3 – Enhance the Town's Approach to Project Prioritization (2/2)

Step 3: Communication

- Assign ownership of the new prioritization framework to a member of the Senior Leadership Team. This includes explicit timelines to track progress and maintain accountability. In many cases this responsibility will reside with Finance, Office of the CAO or Strategic Initiatives. This will be dependent on the organizational structure, capacity and capability.
- Create relevant training and communications of the new framework. This should include communicating changes to Council, management and staff so that there is a clear understanding of the prioritization process. It should also include all relevant templates. Staff and management communications should outline the new processes and set expectations.

Step 4: Pilot and Implement the Framework

- Changing how an organization manages demand and supply for prioritizing resources can be difficult. We suggest piloting the framework to work out any issues or challenges with the process. This could be dual run for the first year (existing process plus the pilot) or a mock year. Once the pilot is complete re-assess the process, timeline, templates, training material to address any issues or challenges.
- Once the framework is in practice, the Town should review it annually to optimize it. For example, you may find that the weighting needs adjusting to reflect new priorities from Council.

Benefits

- Improve resource management across the Town.
- Improved communication and organizational alignment of staff and priorities.

Risks

- Adoption to the new process does not occur and the Towns is not able to meet (or keep up with) the demands.
- The new process requires more effort causing work delays.

#4 – Develop an IT Master Plan (1/2)

Current Situation

- Our analysis indicates that until recently, IT's focus has been on infrastructure and resiliency and less on ensuring divisions have appropriate systems and information management.
- One of the Town's strategic initiatives centers around "future readiness". However, the Town operates without a multi-year IT plan for investments in technology. Particularly in systems, integration and data use.

Recommendation

Develop an IT Master Plan to address system / data gaps and enhance automation.

Step 1: Information Gathering

- The Town should begin by developing an overview of its current IT environment and a preliminary list of key stakeholders for subsequent steps. To achieve this the Town should:
  - Conduct an inventory of existing IT systems and infrastructure.
  - Review IT spend, key performance metrics e.g. service tickets, change requests, project data.
  - Identify key stakeholders for further consultation. The purpose of these consultations is to gather the perspectives and identify specific requirements.

Step 2: In-Depth Analysis

- Regardless of whether the Town does this work with internal resources or a third party, the Town needs an analysis of the current IT landscape to identify challenges, trends and insights for decision-making. The following actions are necessary:
  - Engage IT experts to assess all aspects of the technology the Town uses as well as the level of service and value the IT division provides. Where possible this analysis should compare with industry practices such as COBIT, ITIL, and PMBOK.
  - Along with above, the Town should also assess its digital presence. Using an industry standard frameworks to analyze the Town's website and customer service channels.
  - Record and document all feedback received during the consultations. Continue by analyzing the feedback to identify common themes, pain points, opportunities and any patterns that emerge.
- The Town may also wish to perform industry research. This may include peer analysis (reaching out to peers to understand key aspects that the Town has an interest e.g. future projects, existing concerns / issues, etc.)
- This could also take the form of general market research to understand technology trends that the Town may wish to consider. For example, the adoption of Cloud and Artificial Intelligence.

COBIT – Control Objectives for Information and Related Technologies ITIL – Information Technology Infrastructure Library PMBOK – Project Management Body of Knowledge

#4 – Develop an IT Master Plan (2/2)

Step 3: Development and Documentation of the IT Master Plan

- Next, the Town should develop recommendations informed by the analysis, transform these recommendations into a comprehensive IT Master Plan. To achieve this, the Town should:
  - Use the analysis from the previous step, facilitate workshops with key stakeholders to define the plan's scope, objectives and key initiatives. This helps to ensure the IT Master Plan is informed by diverse perspectives and aligns with the Town's unique challenges and opportunities.
  - Propose a set of prioritized, actionable recommendations and solutions informed by the analysis. Ensure they align with the Town goals, incorporates practices from peer comparisons and aligns with industry trends.
  - Evaluate the implications of these recommendations on the current IT infrastructure and operations to ensure they are both beneficial and realistic within the Town's existing IT environment.
  - Develop an implementation roadmap with specific timelines and milestones. Spread out timelines of initiatives to ensure IT projects have adequate resourcing.

Step 4: Continuous Monitoring and Adaptation

- The pace of technology change is exponential and therefore requires a process to review and revise the Town's newly formed IT Master Plan.
- Conduct routine evaluations of ongoing IT projects to assess their performance and alignment with the IT Master Plan's objectives. This will involve reviewing IT performance indicators, data analysis and periodic audits to maintain focus on the strategy's goals.
- Adapt the plan as needed based on feedback, changes in technology trends or evolving Town requirements.

Benefits

- Enhance operational efficiency, enabling the Town to deliver services more effectively and with fewer resources.
- Future-proof the Town's technology – help ensure the Town's technology remains up-to-date.

Risks

- Implementing the plan may require significant financial and human resources, potentially straining the Town's budget and staff.
- Staff and stakeholders may resist changes to existing IT systems and processes, leading to adoption challenges.

#5 – Establishing System Owners (1/2)

Current Situation

The Town does not operate with system owners. In the past this has led to selecting, implementing and configuring systems that may not provide the full value to the organization. In some cases, its even increased staff workload rather than reducing it.

The National Institute of Standards and Technology (NIST) defines a system owner as: *"Person or organization having responsibility for the development, procurement, integration, modification, operation and maintenance, and/or final disposition of an information system."*

Recommendation

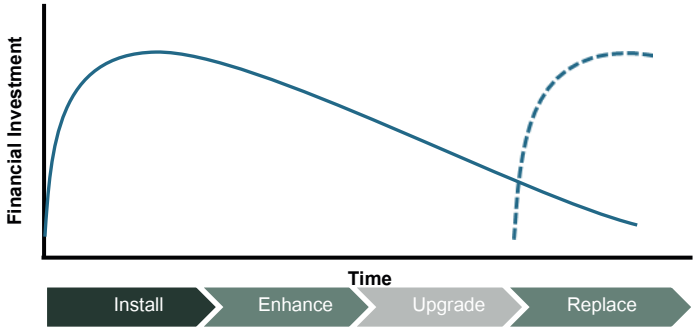
Establish a formal process to designate system owners. Revise the Town's IT governance to include these roles and responsibilities.

Step 1 – Define System Owner Role

- The Town should focus initially of core systems. This will help to reduce complexity and effort. The core systems should include:
  - Finance
  - HR (including payroll)
  - Customer Relationship Management
  - Website
  - Asset / Work Order Management
  - Building / Planning – Permits and Applications
  - GIS

Step 1 – Define System Owner Role (cont'd)

- IT should assist in developing and documenting the system ownership roles and responsibilities. At a minimum they should cover the full lifecycle of a system – procurement / selection, maintenance, enhancements, replace/disposal – see below. The dashed line represents the cycle repeating with a new system



- This will include both day-to-day aspects of the system (e.g. maintenance), as well as changes e.g. enhancements such as integrating with another system or enabling new functionality.
- Ultimately the role should help provide clear direction on the purpose and use of the system and ensuring the Town is able to maximize the value of the system.
- Using a RACI (Responsible, Accountable, Consulted, Informed) determine the Systems Owners responsibilities through each phase of the system lifecycle. Document it and submit it for approval by the Senior Leadership Team.

#5 – Establishing System Owners (2/2)

Step 2 – Integrate Owners into IT Governance

- Having system owners on its own will be an improvement but it needs to be able to integrate with the Towns overall IT Governance. Specifically, decision-making should be a key topic of discussion. For example, typically system owners would roll into an advisory group under an IT Council or IT Corporate Governance group. We understand that the Town is currently making changes to its governance and therefore it is important to align with it.
- During this step, the Town should also assess certain key processes to ensure they are up-to-date. For example, procurement of new systems and developing requirements may need updating to reflect this new role that the Town is introducing.

Step 3 – Identify and Assign System Owner Roles

- Once the governance model (roles and responsibilities) is complete the Town will need to assign owners. Typically, this will be individuals that have a vested interest in the system's functions / processes it supports. E.g. Finance System Owner = Treasurer (or a subordinate thereof). In some cases, it may be more complex, and consideration should be given to who is best candidate consider capacity and capability.
- The Town should also work with HR to determine any issues or concerns with job descriptions and the impact that the new role may have on certain individuals.

Step 4 – Communicate, Train and Rollout

- After identifying the owners next, they will need support in understanding their new role and responsibility. IT should help develop training and reference material to support system owners. Where possible it should align with industry practices such as COBIT or ITIL.
- Communication and rollout should consider time of year, current activities and any other IT governance changes that may be occurring.

Step 5 – Optimize Governance

- On a regular basis as with any governance model it will need review and revisions to optimize and ensure it is fit-for-purpose. We propose initially no less than on an annual basis to review the efficacy of the practices and adjust accordingly.

Benefits

- Improve staff productivity by ensuring systems are fit-for-purpose.
- Improve resident experience - systems that automate activities.
- Reduce risk of purchasing inappropriate systems.

Risks

- Owners may not feel comfortable with their new responsibilities and defer to IT as the default system owner.
- Without appropriate oversight of system owners, the changes may be ineffective.

#6 – Enhance Payroll Automation (1/2)

Current Situation

While the Town has an HR system that provides payroll functionality, there is little integration between it and others. In addition, the configuration of the payroll functionality is causing more processing effort by staff and management.

Recommendation

Automate the payroll process by streamlining process activities, reconfiguring the system and integrating payroll with other key systems.

Step 1 – Review Payroll Process

- Initiate a project to review the current payroll process. This review should use Lean principles to identify waste. The scope of the review should cover the full payroll scope:

Time and Attendance	Pay Calculation / Distribution	Reporting	Maintenance
▸ Setup, record, process and monitor T&A ▸ Manage vacation and absences	▸ Calculate pay ▸ Calculate deductions ▸ Distribute Pay	▸ Periodic reporting ▸ Creating T4/EHT, and other tax forms	▸ Acquire tax tables ▸ Update tax tables and other deductions ▸ Update annual pay changes

Step 1 – Review Payroll Process (cont'd)

- The process review should also assess the level of system support / manual activities. The Town should also capture the effort and duration of activities to build a baseline. The Town will be able to calculate its current cost (staff time and effort) to build a case for change – system / process changes.

Step 2 – Identify Opportunities to Automate

- Assess each activity using Lean to determine the type and level of waste. For example:

Lean Waste	Example
Defects	▸ Time spent trying to identify and fix errors
Overproduction	▸ Creating and keeping spreadsheets to track data from paper forms ▸ Performing pay process weekly
Motion	▸ Managers deliver timesheets to Payroll Clerk
Excess Processing	▸ Rekeying data from forms into spreadsheets and GL system ▸ Managers redundantly tracking record of leave

#6 – Enhance Payroll Automation (2/2)

Step 2 – Identify Opportunities to Automate (cont'd)

- Determine what opportunities may exist to reduce the waste e.g. process change, training, system change / enhancement. Using the information from Step 1, calculate the impact of those changes. This will also help indicate the extent of those changes and whether a large course of action is necessary, e.g. replace the payroll system.

Step 3 – Prioritize Improvements

- Prioritize the opportunities focusing on quick wins that require low effort and are small / easy changes to implement. For larger more complex changes develop a detailed plan, including budget and resource requirements. Work with IT and other divisions as required for any technological changes.

Step 4 – Implement Changes

- Using the Town's project management procedures implement the changes. Give consideration to appropriate change management to help ensure staff are prepared and ready.
- Measure the expected benefits by using the baseline information from early steps.

Benefits

- Improve staff and management productivity by reducing manual steps.
- Ensure the Town's current systems and process activities are fit for purpose.

Risks

- The Town may not have the resources to assess the payroll process using Lean principles resulting in marginal improvements.
- The system configuration changes / integration might be more costly than beneficial.
- Enhancements to the Payroll system, specifically integration with the GL may be contingent on the Town upgrading its current accounting system – thus causing a delay in automating payroll.

#7 – Digitize and Automate Approval Processes (1/2)

Current Situation

As the Town continues to modernize, any area that relies on paper signatures and sees delays as a result should consider updating its practices. There are a few key areas where this happens, and some level of automation would be beneficial.

- Accounts Payable: processes are generally manual; this can lead to issues like duplicate requests for approval on invoices.
- Recruitment: the Town requires signature approvals from general managers on offer letters. This creates a single-person dependency in the recruitment process.
- Records Management: filing records still requires paper approvals.

Recommendation

Automate approval processes where possible by implementing an electronic signature tool.

Step 1: Create an Electronic Signature Policy

- The Town should develop a policy for the use and acceptance of electronic signatures. Responsibility for writing the policy should fall to the Clerks division with input from IT, the Senior Leadership Team, and legal.
- The policy should at a minimum include:
  - Details on the appropriate use of electronic signatures. Identify when a paper signature is always required and from whom.
  - Minimum functional requirements for the technology (e.g., signature must be unique to the signer, technology or process can identify the signer).
  - A process for what to do in cases that require duplicate signatures (electronic and paper).
  - Confirmation that the Town will accept electronic signatures from its residents. This is generally supported by other municipalities in Ontario, such as the City of Waterloo and the City of Toronto.

Step 2: Document Needs

- Identify all use cases of signatures and document them. Consider if any of these use cases have unique considerations / processing requirements.
- The Town should next identify which approval processes it would be beneficial to automate. High volume processes and those that require several layers of approvals are prime candidates.

#7 – Digitize and Automate Approval Processes (2/2)

Step 3: Select an Electronic Signature Tool

- Before selection, develop system requirements for the electronic signature (e.g., system requires method of detecting document manipulation after signing; what systems will IT need to integrate with the tool). Developing these requirements will involve collaboration between Clerks, IT and potentially legal.
- The Town should also identify how many licenses it will need at this time.
- Work with procurement to acquire an electronic signature tool.

Step 4: Implement the Electronic Signature Tool

- Next, implement the selected tool. This will require coordination between the IT and Clerks divisions at a minimum to start the project. A key role for IT at this stage will be integrating the tool with any additional existing Town system (or automation system).
- After system implementation, the Town should select one or two processes and pilot the signature tool. The pilot should result in lessons learned to refine the next implementation.

Step 5: Change Management

- Work with communications to inform staff of the new policy and electronic signature tool.
- The Town should provide resources to its staff on how to use the tool. Provide training / communications to users for any processes the Town moves to an automated workflow.

Benefits

- Modernize workflows, increasing productivity and reducing the amount of paper.
- Reduce physical space for storing paper.

Risks

- There is a risk staff do not adopt the new electronic signature tool.
- Another key risk is staffing misusing the tool. Electronic signatures and automated processes still require oversight.

#8 – Digitize Historical Permits and Inspection Data (1/2)

Current Situation

- The Town is moving to a new system as its primary software for managing permits and inspections. However, historically Building Services has used different methods of storing permits and inspections (e.g., paper, Excel, PDF). This makes it difficult (and time consuming) for staff to lookup this information in its current format and physical location.

Recommendation

Implement a method to access historical permits and inspection data.

Step 1: Identify Needs and Desired Digitization Level

- First, assess the current format and location of historical permits and inspection information. Catalogue and determine the volume that exists. This will help inform the Town in selecting the appropriate method for digitizing the information. For example, if most of the historical data is on physical paper the solution may require a greater focus on scanning them to a digital format. Conversely if most of the information is in Excel or PDF it may only require indexing and cataloguing.

Step 1: Identify Needs and Desired Digitization Level (cont'd)

- Typically, projects of this nature identify levels of digitization and decide what level is appropriate for their needs. For example:

Level 1	Metadata* about the inspection/permit is accessible from a centralized repository.		
Level 2		In addition to metadata, scans of paper documents are available as PDFs for review.	
Level 3			Documents are in a searchable database. (e.g., property address, permit type) and via the document content itself.

- The Town should consider tailoring these levels to its needs. What level it targets will inform future work the Town requires to digitize historical data. For example, if Orangeville decides all it needs is access to metadata about previous work, then it can target Level One digitization. In this case Building Services, with support from IT, would work to capture metadata about historical work in a centralized and searchable format.
- We recommend the Town strive to digitize historical data to a minimum of Level One. While digitizing to Level Three would be helpful, the costs may not outweigh the benefits.

*Metadata is data that describes other data. For example, with a house inspection, the address is metadata.

#8 – Digitize Historical Permits and Inspection Data (2/2)

Step 2: Determine Technology Needs

- Next, the Town should meet with IT to discuss options. A preference should be to re-use existing systems or extend existing systems before any other option. For example, we recommend that the Town explore the use of the new building / permitting system first to see if it has functionality for storing historical data and the ease at which to migrate historical data into it.
- Another option is to capture the historical data in a document sharing system like SharePoint. This is viable depending on the Town's desire for digitization (previous step), cost, effort and benefits. Before any data migration occurs, the Town should assess the options, cost and determine the best course of action.

Step 3: Prepare for Data Migration

- To prepare historical data for migration the Town will need to consider how best to clean the historical data (if at all), which may differ by source. However, the general approach to cleaning data involves:
  - Remove irrelevant data: discard data that is not relevant or necessary
  - Remove duplicates: ensure there are no duplicate entries across the various sources
  - Fix structural errors in the data (e.g., one source includes the date in YYYY/MM/DD format while another source is DD/MM/YYYY)
  - Decide how to handle missing values in the data (e.g., manually search for data, classify as missing/irretrievable)

Step 4: Migrate Data

- After preparing the data for migration the Town can begin migrating data. The method of achieving this differs based on the source of the information and the destination:
  - For PDF records, consider using an online tool to extract data and convert to a CSV file to import the data into the target database.
  - For paper records, scan the paper documents and use a software to extract the data from the scans.
  - For data kept in Excel, convert to a CSV file to import the data into the target database.

Step 5: Quality Assurance

- Once the data migration is complete, verify the quality of the data post-migration. Compare the transferred data to the quality standards from Step 3. Document conformity with the data quality standards. For this and all other data migration work, consider working with the building / permitting system vendor.

Benefits

- With historical data in a retrievable format, Building Services staff will not have to spend extra time finding the information.

Risks

- If historical data is significantly dispersed, cleaning and migrating the data becomes a drain on resources in IT and Building Services.

#9 – Create a Data Strategy (1/2)

Current Situation

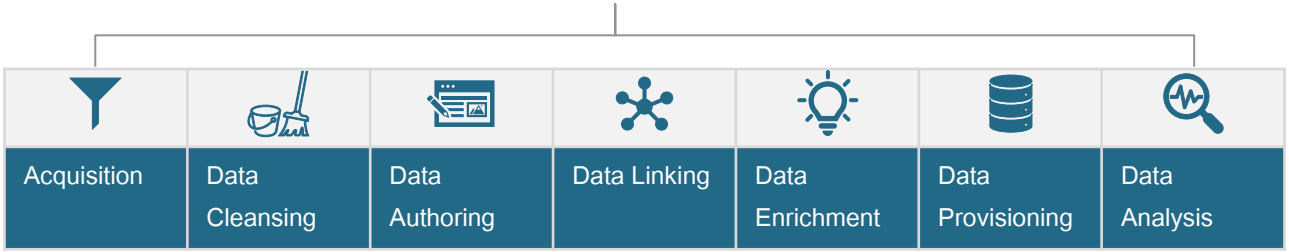
- The Town stores data in several different systems and different formats making it difficult to achieve its desire to use data to inform decisions and efficiently report on service levels and KPIs.
- Data governance is a pre-cursor to effective use of data and information.

Recommendation

Develop a data strategy to implement a Business Intelligence (BI) and Data Warehouse (DW) platform.

Step 1: Formalize Data Governance

- Establish a data governance framework which distinguishes responsibilities of divisions, system owners and IT. The Town should leverage industry practices such as the Data Management Body of Knowledge. The framework should cover the lifecycle of data:



Step 2: Define Business Needs and Data Classification Schema

- Once the governance is in place, it can begin determining the data classification and business needs. Some of this information may already be available in the records management work the Clerks have done. The data classification should at a minimum align with legislative requirements.
- Document the data sources Orangeville uses in a data dictionary format*. Try to capture information on data format, frequency, medium, storage method, division(s) handling the data and how it is accessed (e.g., via SharePoint).
- Create and use a data classification schema which classifies data based on at a minimum:
  - Sensitivity (e.g., public, confidential)
  - Criticality (for example purchase data might be critical, whereas the number of visitors to a recreation centre is not).

*A data dictionary is a reference guide to a data set. It is a centralized source of metadata (which is data about data). It will typically include elements like unique identifiers, names, classification, size and descriptions of relationships between data (e.g.., Account X is associated with Account Holder Y).

#9 – Create a Data Strategy (2/2)

Step 3: Develop a Data Architecture

- In tandem with Step 2, use the data dictionary and other systems information to create a data model consisting (ideally) of three layers of increasing technical specificity:
  - 1. Conceptual Model: a description of the data the Town uses and its relationships.
  - 2. Logical Model: this layer illustrates the movement of data in the overall structure.
  - 3. Physical Model: this final layer draws on the logical model to pull out the requirements to build the data model, it considers technology-specific details.
- With these layers specified, the working group should now document the target data architecture. Consider gathering input from the divisions on what additional data they hope to use in the future. This information will be useful as an input into building a data warehouse.

Step 4: Determine Pre-conditions for a BI and Data Warehouse

- BI and data warehouses can be a costly endeavor. The Town should use the information from the previous steps and the data governance model to determine the pre-conditions for when the Town is ready for a BI and data warehouse. Some conditions may include, the effectiveness of data governance, completion of Step 3, demonstrated skills and capabilities, replacement / upgrade of certain legacy systems.

Step 5: Document the Data Strategy

- At the same time as Step 4, the Town can now document its Data Strategy. The elements it should include are:
  - Initiatives to achieve the Town's data aspirations
  - Specific use cases the Town wishes to adopt and their benefits
  - The target data architecture
  - The formal data governance framework
  - Data skills and capability requirements
  - Transformation roadmap
  - A budget to support the data strategy implementation

Step 6: Acquire a Data Warehouse / Business Intelligence Solution

- As per Step 4/5, the Town should begin a selection process to implement a BI and DW. The approach should focus on high value use cases as pilots to demonstrate its value.

Benefits

- Establish a culture of data driven decision-making.
- Reduce burden on staff to search for information and make corrections.

Risks

- The Town may not have the capabilities to perform this work.

#10 – Develop a Fleet Management Plan (1/2)

Current Situation

In 2022, the Town changed its model from owning vehicles (under 1.5 tonnes) to leasing. While a common practice, it has some drawbacks:

- The cost of this arrangement appears higher than an ownership model. This is particularly true in cases where the vehicles have low usage e.g. fire vehicles.
- The Town was under the impression that the lease agreements would cover vehicle maintenance costs and has paid additional monthly fees of $32-93 per month per vehicle accordingly. However, our analysis indicates that this only covers warrantied repairs, requiring the Town mechanic to perform other maintenance activities. This negates a portion of the assumed benefit of a leasing model.
- Coordination with the vendor has also been challenging. For example, collating the lease agreements for the fleet. Additionally, the terms of the lease agreements vary by vehicle and are not clear.
- The leasing model seems to be adding unforeseen workload on the Town mechanic and the Finance team rather than save staff time.

Recommendation

The Town should develop a Fleet Management Plan and determine the most appropriate ownership model.

Step 1: Conduct a Cost-Benefit Analysis

- We reviewed a high-level staff estimate of the cost of continuing the current lease arrangement compared to owning the Town's fleet, which indicates ownership may be more suitable. However, the Town should conduct a more detailed analysis including other options e.g. other leasing options and a hybrid option (part lease / part ownership).
- The analysis should include considerations for timing and cost of transitions e.g. terminating leases versus completing original terms.
- This analysis will inform whether the Town continues with its current leasing model or transition to a different model.

Step 2: Develop a Fleet Management Policy

- Regardless of the outcome of Step 1, the Town should develop a policy that outlines the roles and responsibilities for fleet management. The policy should provide details on the process for acquiring, maintaining and disposing of fleet vehicles. For example, the Town may wish to include special cases for fire vehicles, allowing the Fire division to acquire and maintain their own fleet. The policy should align with the Town's procurement and asset management policies.

#10 – Develop a Fleet Management Plan (2/2)

Step 3: Assign Fleet Management Ownership

- Per the fleet management policy, the Town should assign ownership of the policy and fleet management. Direct ownership of this function would ensure adherence of the policy across the Town.
- The 2024 budget includes a request for a Fleet Supervisor role in Infrastructure Services. This would be the appropriate position for this oversight.

Step 4: Develop a Fleet Management Plan

- A fleet management plan provides a roadmap for the acquisition, maintenance and disposal of the Town's vehicles and should include detailed strategies to optimize fleet operations, such as cost reduction targets.
- Identify the Town's needs by division, take stock of the current vehicles including their lifespan and the cycle of their leases (if applicable) and identify the costs per vehicle for the next five years. Consult relevant staff from each division for a clear understanding of their needs and the current state of their vehicles.
- Similar to the policy, the plan should align with the Town's procurement and asset management policies.

Step 5: Implement the Fleet Management Plan

- Next, implement the Fleet Management Plan. This will require coordination between the departments that use the vehicles, Finance and the Fleet Supervisor.

Step 5: Implement the Fleet Management Plan (cont'd)

- Regularly track progress against the plan and adjust accordingly. For example, if the implementation schedule allocated too short of a timeframe to dispose of vehicles, lengthen the time estimated to dispose of the remaining vehicles. Document lessons learned as part of the implementation.

Benefits

- Initial estimates indicate a positive case for changing to an ownership model.
- Better oversight of the Town's fleet.
- More predictable forecast of Town fleet needs and expenses.

Risks

- The Town may not be able to fully realize the financial benefit from this transition if the cost of vehicle purchases and maintenance rises significantly in the future, or if there are significant hidden fees with the new vendor.
- Ownership of vehicles comes with its own tasks that will require staff time. Staff can mitigate the risk of additional effort through clear and consistent processes for purchases, maintenance and sales of vehicles across divisions as well as the proper use of the Town's Enterprise Asset Management platform.

/ KEY PERFORMANCE INDICATORS

Establishing Key Performance Indicators (1/2)

There are many Key Performance Indicators (KPIs) municipalities can adopt and many sources to draw from

The Ontario government established its Open Data Directive in 2016 with the goal of "…all data created, collected and/or managed by ministries and provincial agencies to be made public as open data, unless it is exempt for privacy, confidentiality, security, legal or commercially-sensitive reasons."

While not specific to municipalities some have embraced it, such as the City of Toronto. They have established an Open Data Policy that outlines their approach to sharing information with the public. Open data or Open government is cited to deliver the following benefits:

- Making sure different stakeholder groups have access to data to pursue innovation opportunities in technology and analytics
- Increasing transparency and promoting more government accountability
- Creating an open, common and reliable evidence base to support policy development, decision-making and democracy

There are other platforms for open data as well. The Town of Caledon participates in Would Council on City Data (WCCD). They have implemented standards on indicators for sustainable cities, joining over 100 cities to measure and compare progress on a series of benchmarks.

However, a common challenge is ensuring appropriate privacy and security of certain data.

Most municipalities desire to improve their use of KPIs but still rely heavily on annual financial reporting as their evidence

Over the past several years Blackline has conducted surveys with various municipalities to understand their use of KPIs.

- Most report on achieving key milestones e.g. completion of projects, Council priorities, etc.
- There are few that have a dashboard, but where they exist it includes operational metrics in fire (callouts, incidents, response times), public works (complaints, water main breaks, etc.), staffing, licensing / permits and similar stats.
- All indicate a desire to enhance their ability to efficiently report on a number of KPIs but in many cases the barrier is a technological barrier – the data is not easily accessible, or it is difficult to pull the data into a single KPI.

Source: Ontario's Open Data Directive

Establishing Key Performance Indicators (2/2)

There are many different measures to use to measure a municipality's performance – we provide a few that the Town may wish to adopt

Common practice suggests that each KPI should reflect a clear purpose or objective, which typically falls into three categories:

- Efficiency. Evidence that the Town is operating optimally.
- Effectiveness. Residents receive effective services from the Town.
- Transparency. To demonstrate the Town's openness in sharing information.
- To the right we provide a list of potential KPIs the Town may wish to adopt. This is subject to the Town's ability to report on these measures efficiently and accurately. This usually requires sufficient technology (systems, data) as well as governance regarding corporate performance management.

In addition, the following pages provide examples of divisional KPIs to measure performance.

Category	Key Performance Indicators*
 Efficiency	▸ **Customer Service:** Percentage of inquiries (via phone, email, etc.) returned within two days. ▸ **Permits:** Average time to get approval on permits. ▸ **Roads:** Operating expense for paved roads / lane KM. ▸ **Workforce expense**: labour and contracting services / household.
 Effectiveness	▸ **Resident Engagement:** Number of residents subscribed to Town social media accounts, newsletters, and mailing lists. ▸ **Staff Safety:** Total number of employee incidents / 100 employees. ▸ **Asset Management:** Debt to reserve ratio. ▸ **Roads:** Percentage of paved roads ploughed and maintained within 12 hours. ▸ **Recreation:** Total participant hours for recreation programs / 1000 residents. ▸ **Innovation:** IT spend as a percentage of total operating expenses.
 Transparency	▸ **Access to Information:** Number of Freedom of Information (FOI) Requests processed within a given year and time to process the request. ▸ **Competitiveness:** Number of bids per procurement. ▸ **Strategic Alignment:** Progress of corporate initiatives. ▸ **Resident Satisfaction:** Resident sentiment – pulse survey YoY* performance.

*The Town may already gather some of these data points for reporting e.g. Financial Information Return (FIR)

**YoY is Year over Year

Divisional Key Performance Indicators (1/6)

Below we provide a potential list of KPIs by division the Town may wish to adopt and its rationale

Department	Division	KPI	Rationale
Community Services	Economic Development & Culture	Change YoY* in employment rate / total number of jobs in the region	An indicator of economic prosperity for residents in the region. This means Economic Development is successful.
		Change YoY* in amount of commercial space occupied (% or sqft)	An indicator of the attractiveness of the region for businesses.
		$ invested in commercial developments	An indicator of investment in the local economy via business growth. Higher investment dollars / capita suggests a productive Economic Development department.
		Average length of time businesses in the region have been active	Higher number indicates sustained workload and performance of Economic Development.
	Fire Services	Residential fires related to fatalities / 100k residents	Measures the effectiveness of fire services.
		Rate of residential structural fires with losses / 1k residents	Measures the effectiveness of fire services.
		Total fire cost / 1k residents	Measures the cost effectiveness of fire services.
		90% fire station notification response time (rural / urban)	Responsiveness / effectiveness of fire services.

*YoY is Year over Year

Divisional Key Performance Indicators (2/6)

Below we provide a potential list of KPIs by division the Town may wish to adopt and its rationale

Department	Division	KPI	Rationale
Community Services	Facilities and Parks	KM^2 of maintained (outdoor/indoor) space / 100k residents	Measures the quantity and adequacy of outdoor recreation space for the public.
		Operating cost / KM^2 of (outdoor/indoor) space	Measures the cost effectiveness of managing recreation space.
		Utilization rate of useable space (indoor / outdoor)	Measures utilization of spaces available.
	Library	# of library holdings / resident	Measures access and availability of resources.
		Total cost for libraries / use	Measures the cost effectiveness.
		Average # of times in year circulating items are borrowed	Measures the utilization and popularity of library resources.
	Recreation & Events	% of programs at 80% capacity or higher	Fulfillment of capacity in programming.
		$ spend on events / resident	Ensures money is spent on residents and is used as a comparator to other municipalities.
		% of costs recovered from events, programming, and facility bookings - excluding capital costs	Achieving specific thresholds of cost recovery.
		# of Recreation staff / KM^2 of (indoor/outdoor)	Measures effective staffing levels.

Divisional Key Performance Indicators (3/6)

Below we provide a potential list of KPIs by division the Town may wish to adopt and its rationale

Department	Division	KPI	Rationale
Corporate Services	Clerks	Number of FOI Requests / 100k residents	A measurement of work volume.
		Percent of FOI Requests Completed Within 30 Days	Measures the responsiveness / effectiveness of FOI requests.
		Number of infractions / enforcement officer headcount	A measurement of efficiency.
		Number of Complaints / 100k residents	A measurement of work volume.
	Communications	Average response time to resident/business inquiries and requests	Measures the effectiveness and efficiency of communication channels and services.
		Number of Subscribers and Followers on Social Media	A proxy to indicate engagement of the community.
		Resident Satisfaction YoY* performance	Measure satisfaction of the service residents receive.
	Finance	Forecast Deviation (forecast vs. actuals)	Evaluate the accuracy of financial forecasts - an indicator of effectiveness.
		Invoice Processing Time	Measures the efficiency of the finance department.
		Debt-to-Asset Ratio (total debt in relation to total assets)	Evaluate the municipality's leverage, reflecting the municipality's financial health.
		Risk Exposure Index (exposure to interest rate and market volatility)	A measure of the municipality’s effectiveness to manage financial risk.
		Audit Compliance Rate (% of audits completed without major findings)	Measure of the quality of financial controls.

*YoY is Year over Year

Divisional Key Performance Indicators (4/6)

Below we provide a potential list of KPIs by division the Town may wish to adopt and its rationale

Department	Division	KPI	Rationale
Corporate Services	Human Resources	Total Human Resources / Headcount	Measures the volume of work HR staff are managing.
		Total number of employee incidents / 100 employees	Measures the effectiveness of safety practices.
		Diversity of workforce in comparison to demographic diversity	A measure for assessing the municipality's equality.
		Employee Satisfaction Index	Measures the employee perception.
		Total Hours of Training Attended	A proxy for ensuring a capable workforce.
		Permanent Voluntary Employee Turnover Rate	A proxy for indicating staff discontent or disparity in compensation with the market.
	Information Technology	% of systems available x% of time	Goal to minimize operational downtime resulting from tech issues.
		Number of resolved tickets per headcount or FTE	Captures a normalized level of IT staff workload.
		% of tickets resolved within x time	Goal to minimize operational downtime resulting from tech issues.
		% of IT projects delivered on budget / on time	Goal to effectively use resources while delivering important projects.
		IT spend as % of total operating expense	Proxy for investment in IT/ level of innovation of the organization.

Divisional Key Performance Indicators (5/6)

Below we provide a potential list of KPIs by division the Town may wish to adopt and its rationale

Department	Division	KPI	Rationale
Infrastructure Services	Building	Average time to process permits	Measures the efficiency of completing permits.
		Number of permit applications processed / FTE	Measures the total output of each staff member.
		Number of inspections / FTE	Measures workload for inspectors for enforcement functions.
	Capital Works	Engineering project spending / FTE	Measures project support activity of department.
		% of AM Investment Plan funded in Capital Budget	Measures the level of investment in infrastructure maintenance and renewal.
	Planning	Total Cost for Planning / resident	This measure reflects the total cost to provide planning services.
		% of Development Applications Meeting Timeline Commitments	This measure shows the % of development applications that are processed and meet applicable timelines for single-tier municipalities only.
		Effort (FTE) to complete an application	The efficiency of the Planning department to deliver services.

Divisional Key Performance Indicators (6/6)

Below we provide a potential list of KPIs by division the Town may wish to adopt and its rationale

Department	Division	KPI	Rationale
Infrastructure Services	Public Works	% of work orders that are reactive or unscheduled	Indicator of performance issues.
		Litres of Treated Water / 10k residents	Used to monitor the efficiency of the water treatment process.
		Total Costs for the Treatment and Distribution/Transmission of Drinking Water / Megalitres of Drinking Water Treated	This measure reflects the cost effectiveness of drinking water.
		Total Cost of Wastewater Collection/Conveyance and Treatment/Disposal / Megalitre Treated	This measure reflects the cost effectiveness of wastewater.
		Municipality-Wide Greenhouse Gas Emissions / resident	Measure the municipality's environmental impact and promotes sustainable practices.
	Transportation and Development	% of fleet availability	Measures the effectiveness of fleet operations.
		Total Cost for Paved Roads / Paved Lane Km	Efficient maintenance of paved roads.
		Total Cost for Winter Maintenance of Roadways / Lane KM Maintained	A measure of efficiency of maintain roads in the winter.
		% of Paved Lane Km Where the Condition is Rated as Good to Very Good	Measures the quality of roads.
		Average response time to repair potholes	Measures the efficiency of road maintenance services and the ability to provide safe and reliable transportation infrastructure.
		Annual number of public transport trips / resident	Measures the accessibility, affordability, and utilization of public transportation.

/ STAFFING PLAN

About Growth Projections for Orangeville

Forecasts are not determinative, rather, they are tools to inform decision-making

- Blackline created growth projections for the Town on four distinct variables of interest: overall population, households, roads and outdoor recreation space. Indoor recreation space is identified as an important variable to monitor but is not a factor in the growth projection analysis.
- Each growth projection variable has a relationship with distinct services that the Town provides to residents, businesses and other stakeholders. Example services are given in the table to the right.
- Growth in management positions includes those with supervisory responsibilities, such as directors, managers and supervisors.
- conditions and past trends, but the future of Orangeville will be determined by the choices and decisions made by individuals, households and governments reacting to social, environmental, economic, and political factors.

Variable	Change by 2028	Examples of Services Affected*
Population 	↑4.5%	▸ Customer service ▸ Parking and bylaw enforcement ▸ Community engagement ▸ Recreation programming
Households 	↑4.5%	▸ Tax and utilities ▸ Water and wastewater ▸ Fire services ▸ Building and planning
Roads 	↑3.6%	▸ Snow clearing ▸ Road maintenance ▸ Design and construction ▸ Traffic operations ▸ Procurement
Outdoor Recreation Space 	↑2.7%	▸ Outdoor space / facility maintenance ▸ Trail planning, operations and maintenance
Indoor Recreation Space 	↑1.7%	▸ Indoor space facility maintenance ▸ Facility booking

*Not an exhaustive list of services

Summary Across the Organization

Our approach to forecasting growth looks at the effect of automation

- In the automation scenario, we reduce the pace of hiring additional staff for roles that have known opportunities for additional modernization. We make this reduction because technology solutions will ease the workload. Conversely, the scenario without automation does not incorporate this scaling factor.

A gap exists between available and required resources

- The model assumes the Town begins adequately staffed and any forecasted growth is due to an increase in the work drivers.
- For this assumption to hold true, positions necessitating immediate resources are added in 2024 and growth is forecasted from there.

Our forecast model predicts Orangeville will need to add 12 to 16 positions by 2028

- Growth among staff positions is more apparent than in management.
- The largest factor driving growth is additional staff needed to address current gaps – see the following three pages.

Note: Management includes positions with supervisory responsibilities, such as directors, managers and supervisors.
The forecast shows the number of positions. FTEs are converted to positions by rounding up when the decimal is over 0.2.

See Appendix B for details on the model assumptions.
See Appendix C for a breakdown by department.

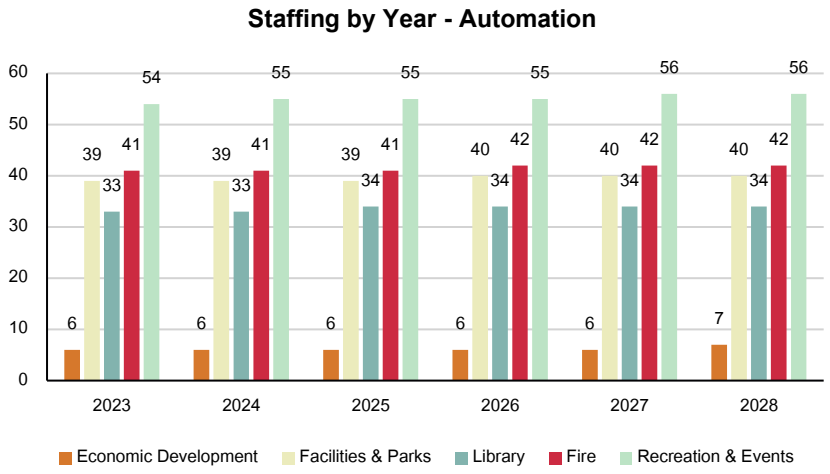
Community Services Growth Forecast

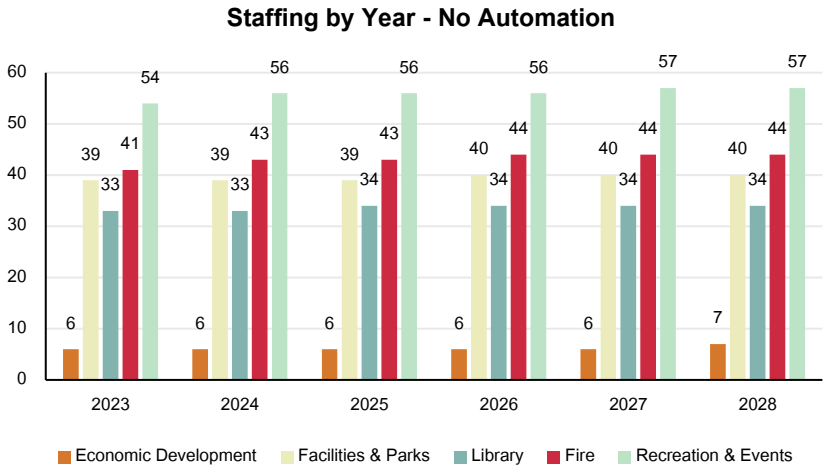
Community services will see moderate growth over the next five years

- Our model considers two scenarios, one with the Town continuing to modernize and adopt technology (graph to the upper right) and a second without it (bottom right). Growth in work drivers applies to both scenarios.
- Without automation, our model predicts Community Services will likely require an additional three positions in 2024 to address existing staffing gaps for Community Services. These roles include a Facility Booking Administrator, Fire Training Officer and Deputy Fire Chief of Administration and Support Services.
- The automation scenario suggests a slower increase in headcount – a difference of three fewer positions by 2028. The variation is seen in Recreation and Events and Fire.
- The majority of services in this division are discretionary (with the exception of Fire). This means staff increases are highly dependent on resident expectations for recreation, events and facilities.

Community services will need to address certain gaps

- Our model predicts an additional two staff for Facilities and Parks and one additional resource in Fire.
- Additionally, there are some capabilities that the Town may wish to invest in, such as extending facility management to include a more strategic role looking at all facility assets across the Town. The Town should consider adding these responsibilities to existing roles or creating dedicated positions.





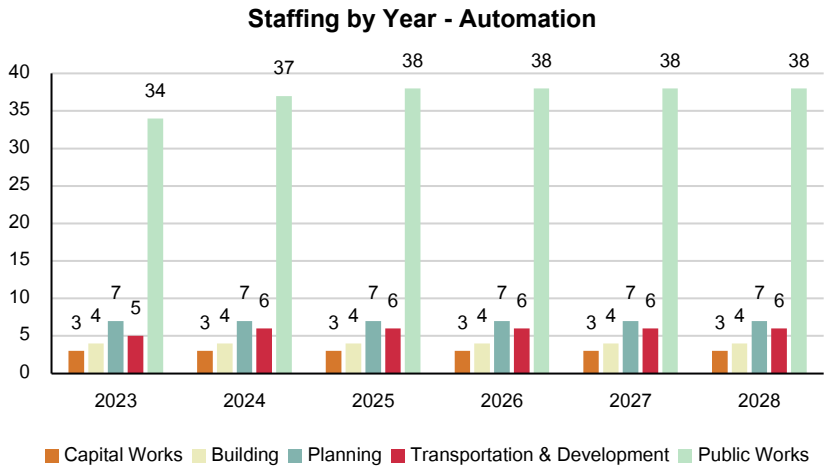
Infrastructure Services Growth Forecast

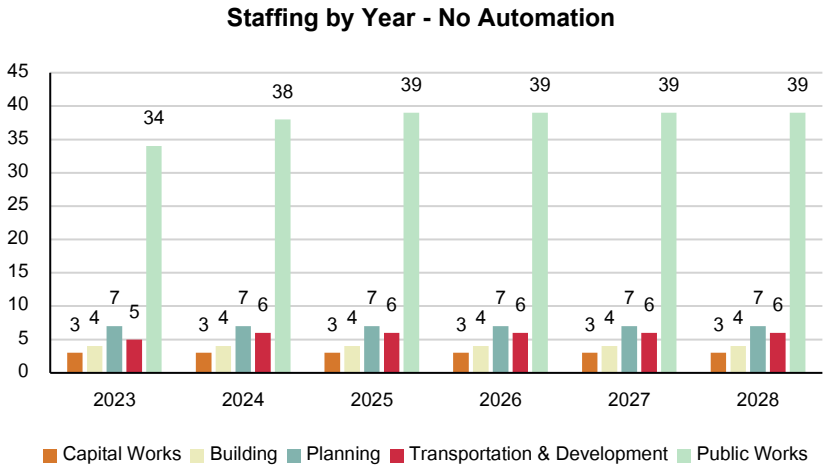
Infrastructure services will see low growth over the next five years

- Our model considers two scenarios, one with the Town continuing to modernize and adopt technology (graph to the upper right) and a second without it (bottom right). Growth in work drivers applies to both scenarios.
- The majority of services in this department are legislative. This means staff increases are dependent on the population, households and road lane-kilometer work drivers.
- Without automation, our model predicts Infrastructure Services will likely require an additional six positions. The automation scenario suggests a very similar increase in headcount – a difference of only one position by 2028 in Public Works. This is because the impact of automation will likely take several years to take effect e.g. planning and building services is in the process of implementing a new system. The benefits of automation will likely occur after that. The pace of growth is just 0.2 FTE each year meaning it does not have a significant impact in a five-year period.

Infrastructure services will need to address certain gaps

- Our model also considers areas that require immediate needs (2024). Based on our benchmarking Infrastructure services will require five additional resources in: fleet management, an engineering technician in Transportation & Development, two Water staff and one Wastewater technician.
- The Town also may also consider a dedicated resource for the maintenance and asset management of stormwater ponds and outlets.





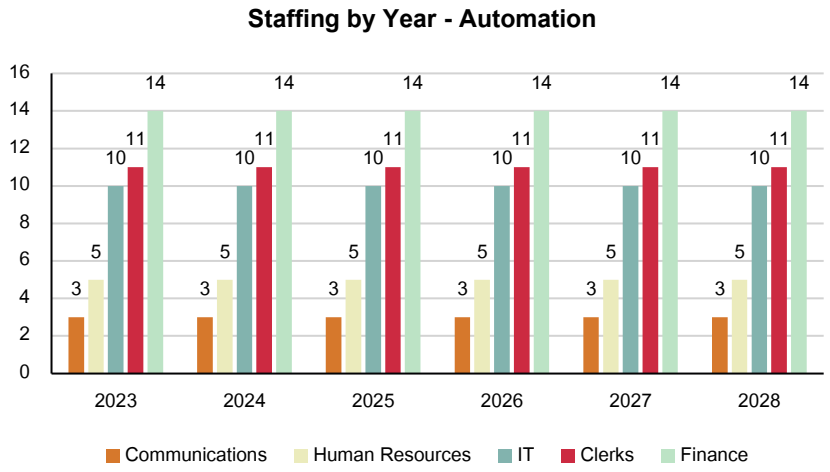
Corporate Services Growth Forecast

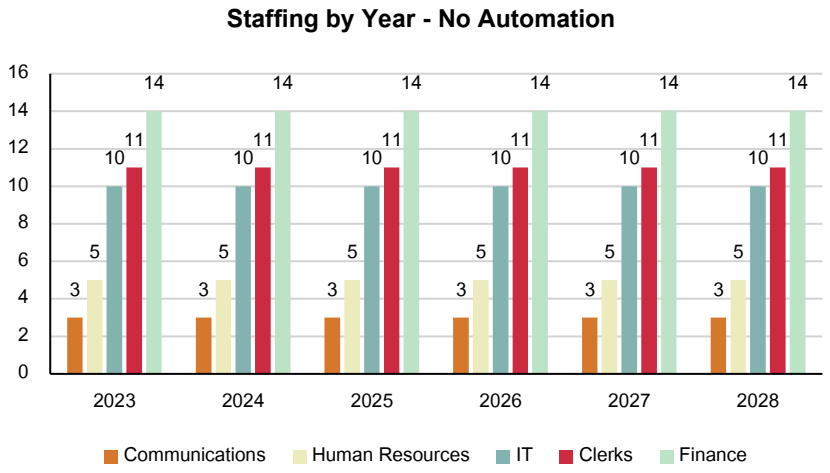
Corporate services will see limited growth over the next five years

- Our model considers two scenarios, one with the Town continuing to modernize and adopt technology (graph to the upper right) and a second without it (bottom right). Growth in work drivers applies to both scenarios.
- Corporate services has an equal mix of legislated and non-legislated services. This means staff increases are at least partially dependent on resident and in some cases staff expectations of support functions.
- Similar to Infrastructure services while there are several opportunities for automation the impact of these will likely show a greater difference in later years.

Corporate services may require additional resources

- Our benchmark analysis of corporate services suggests that the Town is operating within an acceptable range for a number of workload metrics. However, we also understand there will be a focus on modernizing and may require additional IT resources or backfilling project resources. This is also contingent on the Town's reliance on third parties e.g. system vendors for implementation services.
- Additionally, there are some capabilities that the Town may wish to invest in, such as having a role for strategic initiatives and corporate performance management. Equity, Diversity and Inclusion is also an area the Town may wish to expand in the future. The Town should consider adding these responsibilities to existing roles or creating dedicated positions.

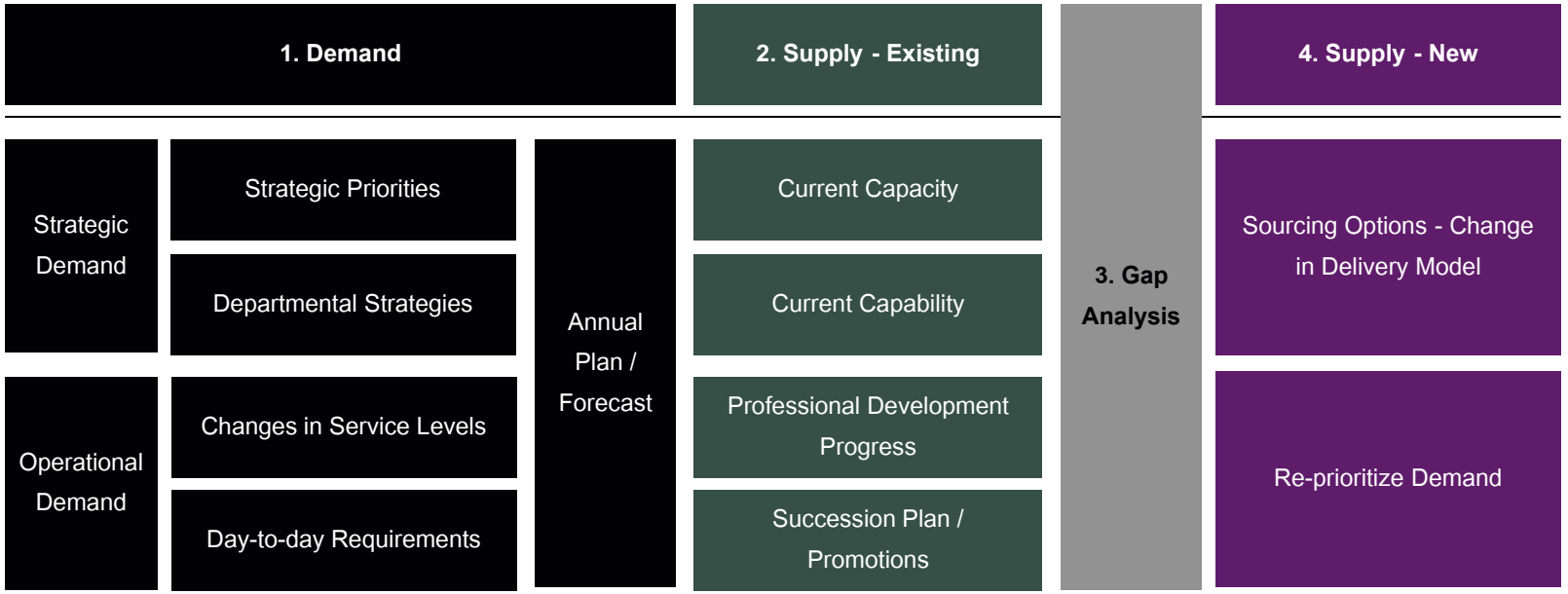




Annual Review Process (1/2)

Below we outline a process the Town may wish to consider for annually reviewing staffing requirements

- Using the theory of supply and demand, the Town can implement an approach to tries to balance the two. The approach (illustrated below) considers both demand drivers and matching them with existing supply first, then assessing any potential gaps. Following the gap analysis, the Town can develop scenarios to meet the demand or, trigger a requirement to reprioritize demand.



- The following page provides further details to this annual review process.

Annual Review Process (2/2)

Understand the Town's Demands

- The review process starts with understanding any changes in demand. There are two categories of demand, strategic and operational.
  - Strategic demand includes both short- and long-term goals. It usually comes from the Town's corporate strategy or Council priorities and the departmental strategy. Strategic demands are usually project based with a defined end date. However, while it may be mostly project based, usually projects have ongoing resources requirements.
  - Conversely, operational demands are ongoing and should consider both day-to-day activities as well as any changes in service levels. Changes in services levels may by driven by legislation or discretionary from the department.
- The demand picture starts at a divisional view and collates into department and total organizational view as part of a three-year rolling forecast. This plan outlines the number of resources and type. It should also include the workforce expense (e.g. salary, wages, benefits, etc.). Developing the three-year rolling plan should align with the annual budgeting cycle.

Assess the Town's Current Supply

- The next phase is understanding the supply that is currently available. This includes reviewing the Town's current staffing levels (by division) staff capability and their professional development progress, any promotions and / or retirements. Periodically, it should also include a compensation review to ensure Town resources are receiving equitable pay. Lastly, the current capacity should include the use of third-parties e.g. contractors or partners. Ideally this current picture of supply is available on a quarterly basis to update any changes.

Determine the Gap

- Next is the gap analysis, to compare the demand with supply and understand if there are any discrepancies. In some cases, it may mean there is more demand than resources or demand that requires a certain capability that the Town currently does not have enough.

Meet the Demand – New Supply

- The final step is to create scenarios to meet the demand requirements. This includes assessing different sourcing options e.g. internal staff, contractors, consultants, extending the use of partners, volunteers, sharing with other organizations. This step should also assess the cost benefits of each viable option and consider any short/long-term implications. Lastly, there may not be sufficient resources or funds to meet the demands. In this scenario, the Senior Leadership Team will need to re-prioritize demand. This may include changing service levels or deferring strategic demand.

Alternative Service Delivery Models (1/3)

There are several options available for organizations to select from when considering how best to deliver services

Delivery Model Option	Description
Staff	Using staff to deliver the service.
Contractor	A third party that provides a particular scope of work or fills a role. This could be a not-for-profit or for-profit organization.
Consultant	Typically, a team to deliver a particular scope of work (project) that requires certain skillsets / expertise.
Shared Services	Sharing the delivery with another organization typically another municipality.
Hybrid	A mix of the above but typically hybrid is between staffing, contractor and or shared services. Consultants are typically used to perform project work not for ongoing service delivery.

Below are some characteristics for situations when it is more suitable to use an alternative delivery to internal staff:

- **Set duration** – the scope is well defined and there is a clear understanding of the duration / completion requirements.
- **Size of work / level of effort** – the effort to complete the scope of work is less than 1x FTE (larger work may be more suitable for a consultancy or outsourcing – out tasking to a 3rd party rather than a contractor).
- **Execution role** – extra "arms and legs" to get a job done (low complexity).
- **Niche expertise** – requires depth of knowledge in a particular niche area (this can also be valid for consultants).
- **Non-customer facing role** – ideally, they are not customer facing roles.
- **Non-management or decision-making role** – ideally contractors are not in a position to act as management unless in the unique case of filling a temporary position e.g. Acting / Interim.

Alternative Service Delivery Models (2/3)

We scored services based on six criteria to assess suitability for shared service

- The criteria, listed to the right, is a set of service characteristics that make it easier or more beneficial to share a service. A service gets one point for every criteria (each criteria also has the same weight).

Some candidates for shared service exist, however it is likely that in most cases the Town would be the provider of the shared services rather than the recipient

- Based on our experience, recent municipal analysis (See Appendix D) and applying the above scoring, there are some candidate services the Town may wish to explore:

Service	Shared Arrangement
IT - Network, Security Services)	Sharing with the County to add scale and IT staff resiliency (reduce potential key person dependencies).
GIS	Sharing with the County to add scale.
Fire – Training	Sharing with neighbouring municipalities to ensure consistent practices and reduce cost.
Procurement (Collaborating)	Opportunistic with neighboring municipalities on key acquisitions – either accessing expertise or economies of scale to improve purchasing power.
Community Development	Enhance coordination and capacity with neighboring municipalities.
Legal Services	Purchasing power for niche legal services or sharing legal staff resources.

Criteria	Explanation
Discretionary Services	There are fewer legislated constraints on these services. The Town can be flexible in how it delivers these services.
Requires Less than one Full-Time Equivalent (FTE)	If delivering a service requires less than one FTE, there is benefit from organizing a greater amount of work across multiple organizations and avoiding staff switching from delivering different types of services.
Does Not Require Local Delivery	Local service delivery (in-person) creates geographical constraints on sharing services across a broad area.
Economies of Scale – Capability	Service delivery benefits from specialization. The work performed by Building Services is an example of this.
Economies of Scale – Capacity	Service delivery benefits from aggregating resources. This tends to apply to services with high capital costs.
Shareable at sub-service level	The nature of a service may make it challenging to deliver in a shared model (e.g., it would confuse residents if municipal communications for the Town came from another municipality).

See Appendix D for Peer Analysis on Shared Services

Alternative Service Delivery Models (3/3)

When developing and managing shared services, agreements should be in place to ensure clarity of expectations on all parties

- Too often we find that shared service agreements lack specificity and relay heavily on the relationship of those that brokered the arrangement. To mitigate this and other risks Blackline suggest at a minimum the terms between the parties include:

Criteria	Description / Example
Services Definition	Clarity of the service description (activities and responsibilities). In some cases (depending on the complexity) it may refer to operational documents that have greater detail. Scope should have clear linkage to volumes and pricing
Service Levels (SLs)	Measures are in place and align to the service definitions. Clearly define SLs and their calculation, use examples to illustrate and avoid ambiguity. Include a mechanism for making variations to Service levels.
Pricing	Pricing transparency is fundamental to all parties. Ideally the pricing unit aligns with the service definition and service levels as those typically drive costs. Determining the pricing model is also important – fixed cost, variable or hybrid. Variable is best when there is a strong linkage between the services and volume e.g. transactional type services. There also needs to be consideration for price adjustments for CPI or other factors over the term of the contact.
Volume	Similar to the above, volume (where possible – especially for variable pricing) should align to the service and pricing units. The contract should also include triggers to renegotiate price based on volume fluctuations.
Service Credit	The consequences of missing a service levels.
Term	Duration of the agreement and terms for renewal. The duration may vary. A key driver for the term is any kind of capital or infrastructure that needs to be put in place. Contracts that focus more on services can have a shorter term with clauses for renegotiations.
Termination	Conditions to terminate the agreement.
Governance	Roles and responsibilities to govern the contract, changes, operations and oversight.

/ APPENDICES

Appendix A

Additional Opportunities (1/11)

The additional opportunities described in the following pages may require further investigation and validation. The are a result of our opportunity analysis described in the executive summary.

#	Problem Statement	Opportunity	Category	Status
1	Taxation processes involve printing off PDFs, processing them and digitizing the documents. Manual processes are inefficient and error prone.	Automate taxation processes to eliminate printing documents.	Technology	●
2	History of staffing changes during system implementation has led to solutions that are not optimally set up for users.	Implement a process that formally documents system requirements for purchasing new systems.	Technology	●
3	Orangeville is increasingly culturally diverse. Diversity will influence the delivery of programs and the languages used to communicate content.	Explore opportunity to provide services in other languages, such as through an interpreter service.	Communication	●
4	The Town does not have a standardized approach for using social media. Different divisions have their own accounts.	Establish a standardized approach to social media posts to ensure consistent messaging and engagement with the community.	Communication	●
5	Supervisors use Google Docs because part time staff do not have access to SharePoint (no @orangeville.ca account). This has proved challenging in practice.	Use a tool to better communicate to part time staff, such as a mobile application. For example, MS Teams or Shifts.	Technology	●

● - In Progress ● - Under Consideration

Appendix A

Additional Opportunities (2/11)

#	Problem Statement	Opportunity	Category	Status
6	Dayforce requires manual adjustment of time entries as the system doesn't record total time correctly when staff "clock-in". This results in a total of two hours a day of Dayforce work for administrators and supervisors. Additionally, Payroll Administrators perform manual workarounds such data validation.	Create an internal project to review and improve Dayforce functionality to accurately record time. Some of this work is already underway.	Technology	●
7	Managers noted a lack in communications training for them as leaders.	HR should develop a training program for managers that teaches them leadership and communications principles.	Training	●
8	Supervisors noted a need for better communication regarding staff departures and the current available resources for their replacement.	Establish a transparent communication protocol for staff departures and resource availability.	Communication	●
9	Customer service representatives are not always aware of items such as special events or recreation bookings. This creates a disjointed experience for customers who call in with questions.	Establish a process to notify customer service staff of upcoming Town events. This could be a shared Outlook calendar for example.	Communication	●
10	The process to check out library materials is manual and there is no self-service function.	Invest in a new collection management system which includes a self-service function for customers.	Technology	●
11	Some functions follow individuals as they transition to other roles within the Town, such as providing comments on traffic and capacity. These functions would traditionally sit with other divisions or roles.	Transition work to the correct divisions and roles. Ensure the individual that receives the work has adequate training for the task. The transition may take time and require active involvement from the original owner of the work at first.	Workload Management	●

● - In Progress ● - Under Consideration

Additional Opportunities (3/11)

#	Problem Statement	Opportunity	Category	Status
12	The responsibility for crossing guards falls to the Library, which is a legacy reporting structure. This leads to a large span of control for the Library CEO.	Review the Town's current reporting structure and try to move crossing guards under a supervisor in a lower layer of the organization.	Organization Structure	●
13	Staff using Bids & Tenders struggle with the platform at times due to limited support and resources.	Provide comprehensive training / resources for staff using Bids & Tenders.	Training	●
14	The Town is running an unsupported version of Great Plains which can pose security and functionality risks.	Transition to a newer accounting software.	Technology	●
15	Finance calculates development charges. This takes a lot of time because Finance staff do not know how to read technical plans.	Provide training to Finance staff on reading technical plans to improve their speed and ability to calculate development charges OR shift the responsibility to another division.	Training	●
16	Limitations for storing equipment requires Public Works and Parks to leave equipment outside, exposed to weather. This can degrade equipment or reduce their useful life.	Acquire more storage space for Public Works and Parks operations.	Equipment	●
17	Older systems are not working on all iPads, specifically Collectors and Field Map and this hinders fieldwork. This is due to an integration issue between Town iPads and staff personal devices which they use to connect to the internet.	Upgrade to field devices with mobile data for internet access so staff do not need to connect via personal devices.	Technology	●

● - In Progress ● - Under Consideration

Additional Opportunities (4/11)

#	Problem Statement	Opportunity	Category	Status
18	The Town uses the GeoTab platform, which offers a wide range of capabilities, yet it remains significantly underutilized. This includes the potential to provide public access to vehicle tracking data, real-time monitoring of task progress and features for conducting vehicle inspections.	Implement GeoTab features such as public access to vehicle tracking data and real-time monitoring of tasks.	Technology	●
19	There is a lack of succession planning for senior roles in the organization. The absence of a succession plan creates uncertainty regarding how staff retirements will be handled.	Develop succession plans for staff in management roles.	Process	●
20	HR is finding it challenging to fill positions quickly. It currently takes about 3 months to a fill a vacation position. This has caused internal dissatisfaction and complaints about the prolonged recruitment process.	Identify specific recruitment challenges and potentially allocate more resources to expedite the hiring process and reduce workload pressures.	Workload Management	●
21	Demand for facility bookings is increasing and requires staff to complete the request. Resulting in poor response times and delays for customers.	Improve self service functionality for facility bookings. This should include the ability for customers to see availabilities and make payments online.	Organization Structure	●
22	There is currently a delay of 2-3 months in seeing financial actuals in Great Plains. To perform decision-making and financial analysis, staff utilize information in Xplr Recreation which may be incomplete.	Implement an API link between Xplr Recreation and the Town's financial system for real-time financial data and automated reconciliation.	Technology	●

● - In Progress ● - Under Consideration

Appendix A

Additional Opportunities (5/11)

#	Problem Statement	Opportunity	Category	Status
23	Staff are not aware of the strategic priorities in other areas.	Establish cross divisional and inter-divisional communication channels such as formal periodic meetings.	Communication	●
24	Multiple divisions are independently updating and creating website content which has led to a lack of cohesion / overall worse website quality.	Implement a centralized web management strategy and conduct a thorough website content overhaul.	Communication	●
25	Sometimes there are several ads running on radio stations, and at other times there are none. This is a symptom of not having an overarching communications strategy that is sufficiently specific.	Implement a strategic and consistent ad scheduling plan to take advantage of bulk ad purchasing and optimize advertising campaigns. This should be one component of a broader communications strategy.	Communication	●
26	Currently, there are nine Canva (a graphic design software) memberships, with each team paying non-bulk pricing.	Consolidate Canva memberships to a team membership to save money.	Technology	●
27	Some staff join meetings with an internal goal of providing meeting minutes within two weeks, such as QMS meetings. However, due to workload, the actual delivery often extends to months.	Implement a streamlined process for capturing, preparing, and disseminating meeting minutes promptly after meetings to bridge communication gaps and facilitate timely decision-making.	Communication	●
28	The Town is using a custom marriage system, however there is currently no one capable of making modifications. Staff require certain changes and are having to perform a manual work-around.	Implement a standard tool for issuing marriage licenses.	Technology	●

● - In Progress ● - Under Consideration

Additional Opportunities (6/11)

#	Problem Statement	Opportunity	Category	Status
29	Recreation customer service representatives use Xplr Recreation for billing, but those who need to access invoices cannot do so because they cannot log into the primary account.	Resolve login and access issues to ensure that authorized individuals can access and manage invoices in Xplr Recreation.	Technology	●
30	Parking Administrators file physical tickets, enter data manually into ticket processor and again enter data manually into Great Plains. Physical tickets are labelled 0-15 to indicate the type of ticket. These numbers are not indexed the same in Great Plains.	Increase efficiency in parking ticket processing through a single, centralized and digital platform.	Technology	●
31	There is a disconnect in communication between recreation programming and facility operators, leading to issues such as operators scheduling 75-minute games within one-hour slots and hockey leagues not having staggered game start times.	Establish better training and communication between recreation programming and facility operators to ensure accurate scheduling and efficient use of facility resources.	Training	●
32	Facility Operators receive their shift schedule the night before. This has led to issues during events like tournaments and Canada Day when planning is required further in advance.	Implement a scheduling system that allows operators to receive schedules well in advance of major events.	Process	●
33	The Town does not currently have a proactive watermain replacement program and instead replaces watermains when the road is being replaced.	Establish a proactive watermain replacement program to enhance the management and maintenance of the water distribution system in the Town.	Process	●

● - In Progress ● - Under Consideration

Appendix A

Additional Opportunities (7/11)

#	Problem Statement	Opportunity	Category	Status
34	Capital Works believes that dedicated Project Managers are required for various critical areas. This is supported by the list of current and upcoming projects (e.g., projects related to storm water management, roads).	Complete a cost-benefit analysis regarding hiring dedicated project managers on contractor or fulltime basis for upcoming capital works projects.	Organization Structure	●
35	Automation is not being used to connect requests to Clerks with internal software.	Implement automation that directly connects requests to Clerks with internal software, such as eScribe, based on the currently used online forms.	Technology	●
36	Library and Aquatics staff do not have laptops available for programming.	Purchase laptops to facilitate programming and assist with front desk matters.	Technology	●
37	The Library currently uses a cash register for all transactions.	Provide a POS system for the Library to conduct transactions and connect the information to internal systems for tracking and reporting.	Technology	●
38	Public Works employees are not told in advance about jobs that need to be completed. This leaves them with little time to prepare for the work and can lead to increased timelines and inefficiencies.	Implement a scheduling and planning process to proactively notify Public Works staff of upcoming tasks and streamline their work processes.	Technology	●

● - In Progress ● - Under Consideration

Additional Opportunities (8/11)

#	Problem Statement	Opportunity	Category	Status
39	Recreation and Events currently does not have a process in place for change management. This leads to confusion with staff members regarding whether changes are to be implemented or if they are simply conceptual.	Establish a clear and structured change management process, ensuring implementation of changes and consistent service delivery within the division.	Process	●
40	There is currently a shortage of full-time day staff. Due to this, part time staff members are filling the time slots and reaching their hours capacity quickly. This is causing a higher turnover and inability to provide services.	Consider the addition of full-time day staff to Recreation and Events.	Workload Management	●
41	There is no defined set of training that occurs at each level within the Corporate Services department.	Create a trackable and time-bound training program for various roles within departments.	Training	●
42	The Library has a limited programming offering to the community. This is due to staff capacity and unfilled functions within the division. Community surveys indicate significant support for the Library to expand service offerings.	Consider the addition of a full-time resource to support community outreach and programming.	Workload Management	●
43	The Town relies on one mechanic for the entire vehicle fleet. This person also brings home a vehicle for emergencies and is on-call 24/7.	Hire support for the mechanic to alleviate solo work and single person dependency.	Organization Structure	●
44	There is a significant number of paper-based processes within Water and Wastewater.	Automate processes and develop digital means for storing and using operations data.	Technology	●

● - In Progress ● - Under Consideration

Appendix A

Additional Opportunities (9/11)

#	Problem Statement	Opportunity	Category	Status
45	Some positions with the same title are reporting to different layers (e.g. Infrastructure Technician) and similar functions have an imbalance of reports (e.g. Supervisor of Water Works with 12 reports compared to the Supervisor of Wastewater with four reports).	Standardize hierarchical arrangements and span of control for analogous functions where appropriate.	Organization Structure	●
46	The Town has detailed job descriptions; however, there is a misalignment between these descriptions and the actual roles and responsibilities carried out by individuals.	Define and align job descriptions with the actual duties and responsibilities of each role.	Organization Structure	●
47	There is a significant difficulty with the Accounts Receivable (AR) information flow from various divisions to the Finance department. This has impacted timeliness and accuracy.	Revise the AR process to ensure Finance receives information from other divisions accurately and on-time.	Process	●
48	Roads patrol deficiencies are noted on paper and handed to the lead hand, who then inputs the deficiency and creates a work order in Excel.	Implement a digital system for tracking and managing patrol deficiencies to reduce the risk of errors and improve efficiency.	Technology	●
49	The current phone system used by the Town is not integrated with the customer service software. This requires CS staff to manually track information from calls.	Integrate the phone system with the Town's customer service software to enable better tracking and management of customer interactions.	Technology	●
50	If customer service staff transfer an inquiry to another division and the administrator in that division is not available, the customer is bounced back.	Implement an improved customer service process that includes soft transfers when administrators are unavailable.	Process	●

● - In Progress ● - Under Consideration

Additional Opportunities (10/11)

#	Problem Statement	Opportunity	Category	Status
51	There is no structured process in place to manage work requests submitted to Communications.	Implement a work order process for managing work requests submitted to Communications.	Process	●
52	There is a gap between demand for communication services and supply that the division can deliver. As a result, divisions are bypassing Communications and creating their graphics using non-graphic design tools.	Provide additional support either through a full-time Communications role or through a consultant.	Workload Management	●
53	The Town does not have a consistent style guide and standardized voice across its communications and documentation.	Implement a formal style guide to ensure consistency in all communications and documentation.	Communication	●
54	The Town doesn't always consult the appropriate staff for division specific communication efforts. For example, Water will not be consulted for communication to the public regarding water maintenance work.	Involve the appropriate divisional staff in public communications about their operations.	Communication	●
55	Wastewater inspection activities are currently being performed by Roads staff, despite them not having the necessary licenses to legally conduct these inspections.	Shift wastewater inspection activities from Roads staff to qualified Wastewater personnel. This way the Town can ensure compliance with regulatory requirements and legal standards.	Training	●
56	The Town faces challenges in recruiting new facilities operators due to stringent certification requirements.	Help new hires obtain these mandatory certifications as part of the onboarding process (e.g., through reimbursement).	Training	●

● - In Progress ● - Under Consideration

Appendix A

Additional Opportunities (11/11)

#	Problem Statement	Opportunity	Category	Status
57	The Town is acquiring a new building / permitting system. Staff highlighted first and foremost the need for system availability in the field.	Ensure building inspectors can access the new building / permitting system while in the field.	Technology	●
58	Building inspectors have to cross Town from their office to get work vehicles from the Public Works depot. With traffic, this is a productivity loss.	Designate a parking spot for building inspectors at Townhall.	Equipment	●
59	The Town's website does not have self-service options for customers.	Enhance the Town's website and forms to include more self-service options, such as registering as a Delegate to Council.	Technology	●
60	IT staff currently do not have sufficient training in project management. This has resulted in challenges with stakeholder engagement, unstructured IT project intake and fragmented project planning.	Provide Town staff training on project management to ensure corporate projects are successful.	Training	●
61	The Town currently relies on external contractors for specific IT services, particularly network services. This approach offers limited control over service delivery.	Internalize certain IT services (network services) and improve contract oversight.	Contracted Services	●
62	The Town has IT staff with specialized knowledge and skills, creating key person dependencies.	Cross train IT staff where appropriate to reduce key person dependencies.	Training	●

● - In Progress ● - Under Consideration

Appendix B

Model – Approach and Key Assumptions

The workforce prediction model is based on several factors

- Blackline created two scenarios to look at expected future workforce needs. The first scenario represents the current state, while the second scenario demonstrates the potential impact of automation on various municipal services.
- We have forecasted future workforce needs based on projected population, households, road kilometers and outdoor recreation space.
- We then used these predictions to model the workforce requirements for each service and rolled them up to the departmental and overall municipal level.
- The forecast shows the number of positions. FTEs are converted to positions by rounding up when the decimal is over 0.2. In most cases, the number of positions will be congruent with the headcount in 2023, but there may be differences where the FTE goes above 0.2 for a specific role.

Assumptions
► Each municipal service is assigned one of four primary work drivers to determine its overall workforce needs. While other work drivers exist, there are four primary drivers: population, households, road kilometres, and square metres of outdoor recreation space. ► Demographic population projections are calculated using the average growth rate for Orangeville between 2005 and 2022. This rate is approximately 0.6% per year. ► Road kilometres and outdoor recreation space per person is based on the per-capita incremental increase across Ontario over the past five years. ► The model does not account for significant changes in legislation. ► The model assumes current service levels are maintained.
► The model assumes current service delivery models remain the same. ► 2023 is the baseline. Staff required to meet capacity are assumed to be added in 2024. The specific staffing needs vary depending on the scenario considered. The scenario without automation necessitates a higher number of staff compared to the scenario that incorporates automation. ► There have been some changes in staff during the engagement, such as the inclusion of two supervisors in IT. These were not included in the 2023 baseline.
► Each service has been assigned a score indicating its potential for automation (low, medium, or high). The current level of automation for each service has also been identified. A discount factor is applied to the forecasted workforce needs of each service based on its potential for automation. ► The discount factor determines the impact of implementing automation on workforce requirements.
► The municipal workforce is divided into two levels: management and staff, based on the provided data. Future workforce increases were calculated on the assumption that the ratio of management to staff will remain constant at the division.
► Predicted workforce needs in full-time equivalents (FTEs) are converted to positions by rounding up as the decimal is over 0.2.

Appendix C

Full Break down of Positions By Division (1/2)

The below table illustrates the changes by number of positions

Please note that management includes positions with supervisory responsibilities, such as directors, managers and supervisors.

Total Future Positions				Without Automation					Automation				
Division	**Level**	**Ratio**	**2023**	**2024**	**2025**	**2026**	**2027**	**2028**	**2024**	**2025**	**2026**	**2027**	**2028**
Overall	Management	12%	32	36	36	36	36	36	33	33	33	33	33
	Staff	88%	236	241	243	244	246	248	240	242	243	245	247
Building	Management	27%	**1**	1	1	1	1	1	1	1	1	1	1
	Staff	73%	**3**	3	3	3	3	3	3	3	3	3	3
Capital Works	Management	33%	**1**	1	1	1	1	1	1	1	1	1	1
	Staff	67%	**2**	2	2	2	2	2	2	2	2	2	2
Clerks	Management	19%	**2**	2	2	2	2	2	2	2	2	2	2
	Staff	81%	**9**	9	9	9	9	9	9	9	9	9	9
Communications	Management	33%	**1**	1	1	1	1	1	1	1	1	1	1
	Staff	67%	**2**	2	2	2	2	2	2	2	2	2	2
Economic Development	Management	17%	**1**	1	1	1	1	1	1	1	1	1	1
	Staff	83%	**5**	5	5	5	5	6	5	5	5	5	6
Facilities & Parks	Management	8%	**3**	3	3	3	3	3	3	3	3	3	3
	Staff	92%	**36**	36	36	37	37	37	36	36	37	37	37
Finance	Management	23%	**3**	3	3	3	3	3	3	3	3	3	3
	Staff	77%	**10**	10	11	11	11	11	10	11	11	11	11
Fire	Management	8%	**3**	5	5	5	5	5	3	3	3	3	3
	Staff	93%	**38**	38	38	38	39	39	38	38	38	39	39
Human Resources	Management	40%	**2**	2	2	2	2	2	2	2	2	2	2
	Staff	60%	**3**	3	3	3	3	3	3	3	3	3	3

Appendix C

Full Break down of Positions By Division (2/2)

The below table illustrates the changes by number of positions

Please note that management includes positions with supervisory responsibilities, such as directors, managers and supervisors.

Total Future Positions				Without Automation					Automation				
Division	**Level**	**Ratio**	**2023**	**2024**	**2025**	**2026**	**2027**	**2028**	**2024**	**2025**	**2026**	**2027**	**2028**
Overall	Management	12%	32	36	36	36	36	36	33	33	33	33	33
	Staff	88%	236	241	243	244	246	248	240	242	243	245	247
IT	Management	10%	**1**	1	1	1	1	1	1	1	1	1	1
	Staff	90%	**9**	9	9	9	9	9	9	9	9	9	9
Library	Management	13%	**4**	4	4	4	4	4	4	4	4	4	4
	Staff	88%	**29**	29	29	29	29	30	29	29	29	29	30
Planning	Management	17%	**1**	1	1	1	1	1	1	1	1	1	1
	Staff	83%	**6**	6	6	6	6	6	6	6	6	6	6
Public Works	Management	12%	**4**	6	6	6	6	6	5	5	5	5	5
	Staff	88%	**30**	32	33	33	33	33	32	33	33	33	33
Recreation & Events	Management	7%	**4**	4	4	4	4	4	4	4	4	4	4
	Staff	93%	**50**	52	52	52	53	53	51	51	51	52	52
Transportation &	Management	22%	**1**	1	1	1	1	1	1	1	1	1	1
Development	Staff	78%	**4**	5	5	5	5	5	5	5	5	5	5

Alternate Delivery Models – Peer Analysis

In a recent peer review of 14 other municipalities in Ontario most provide legal, waste, forestry and engineering services through alternative service delivery models

- Conversely, payroll, fire and emergency services, planning and development, human resources, facilities management and bylaw enforcement are mostly delivered in-house.
- Some municipalities identified using external service providers for more technical projects because of the expertise they can provide. One noted that it was becoming challenging to find skilled tradespeople to respond to their RFPs.
- Municipalities that implemented shared service models identified cost savings, skilled staff, infrastructure and small size as reasons for adoption.
- However, a consequence of shared service is that it still requires oversight and involvement, including governance and evaluation of service delivery.