Subject:	**Status Report on Blackline Opportunities**
Department:	**Administration**
Division:	**CAO**
Report #:	**CAO-2024-010**
Meeting Date:	**2024-11-18**

Recommendations

That report CAO-2024-010, Status Report on Blackline Opportunities, be received;

Overview

The purpose of this report is to provide a status update on the progress that the Town administration is making on addressing the 72 opportunities identified in the November 2023 report "Organizational Review – Managing Future Growth". The report identified 10 "priority" opportunities along with an additional 62 other opportunities to be addressed across the Town to create a strong and stable operational environment.

Key resources have been deployed for the top 10 priorities with divisional managers working on some of the other 62 additional opportunities. Several of the additional opportunities are in progress with many completed. Several of the 62 additional opportunities that have not yet been started are planned for 2025, 2026 and 2027.

The Town is seeing significant progress on these initiatives given existing service delivery pressures across all Town operations. Considerable operational and performance impacts have been realized with more outcomes planned for the balance of 2024.

The Strategic Initiatives team will continue to drive for results in partnership with the leaders and staff across the Town, ensuring the planned results are achieved with excellence in alignment with our values.

Background

In 2023 the Town hired Blackline Consulting to review the Town's organization and operations. Blackline engaged staff at all levels to develop a robust picture of the opportunities that existed to improve and enhance the operation of the Town's

administration. A detailed report was completed and presented to Town Council in November 2023. Some of the 72 opportunities identified were specific to a division within the Town and some of the opportunities were more "corporate" in nature, meaning their impact was across many or all Town divisions.

Once the report was finalized and presented, Town Council affirmed its expectation that the Town, through the leadership of the Chief Administrative Officer (CAO), would work to action the opportunities in the report and report back to Council on the progress of the opportunities.

In January 2024, the CAO, and the Senior Leadership Team (SLT) met to review and develop the corporate and departmental workplans for 2024. The work plans were a combination of known needs, Council priorities, and other opportunities such as those documented in the Blackline report. At the same time the CAO was sponsoring the creation of the Strategic Initiatives (SI) team who, partnering with the CAO and SLT, would drive the development of these opportunities into deliverable projects. For the 2024/2025 workplan the SI team has been focused on many of the priorities found in the top 10 list.

In preparation for the status report, the SI team reviewed the 62 additional opportunities to report on their progress. In addition to the top 10 priority opportunities and the additional 62 opportunities, two other initiatives were identified as priorities for the SI 2024 workplan. These initiatives were 1) Growing Orange, and 2) Land Mobile Radio Upgrade for Fire Services.

Analysis/Current Situation

Overall, from the 12 projects, 8 are <u>On-Track</u> and 4 are <u>Planned</u> to start. The following status summary provides the current state of the priority projects.

Project/Initiative: Growing Orange

Sponsor: David Smith

Project Manager: Shannon McGrady

Status: <u>On-Track</u> - Key deliverables include developing and introducing the Team Ambassador Group (TAG), the discovery and defining of the core values - Respect, Integrity, Team and Excellence, and completion and analysis of the Employee Engagement Survey, including future focused action planning to strengthen and improve results moving forward. We are on track for the development of a multi-year "People Plan" to support ongoing enhancements of the workplace culture and organizational effectiveness to be completed by end of December 2024.

Project/Initiative: Service Level Framework

Sponsor: Chris Moore

Project Manager: Andy Best

Status: <u>On-Track</u> – Work is underway to define service levels and key performance indicators for service delivery across the Town. Workshops have been held with Community Services and Infrastructure Services to identify KPIs and discuss ways in which a dashboard can be created for divisions, departments, and the corporation to ensure that services are measured, and data is available to make ongoing business decisions. There is a planned January 2025 launch of an internal dashboard which will report on service delivery metrics.

Project/Initiative: Customer Service Framework (Service Excellence)

Sponsor: Chris Moore

Project Manager: Andy Best

Status: <u>On-Track</u> – The first phase of this project has focused on the development and implementation of policies and standards to standardize customer service across the organization and ensure consistency and clarity on the delivery of service. Phase one of this project will be completed by the end of 2024. The second phase of the project will begin in early 2025 with the development of a longer-term strategy and recommendations on delivery methods, automation technology, integration with systems and information and an organizational delivery model.

Project/Initiative: Project Prioritization Enhancement

Sponsor: Chris Moore

Project Manager: Andy Best

Status: <u>On-Track</u> – The first phase of this initiative has been developed with the team delivering to the Town's managers a "Municipal Prioritization Matrix" tool to enhance data-driven decision-making in terms of 2025 budget requests for the operating budget. Feedback on the tool has been reviewed with adjustment to be made for the 2026 budget cycle.

Project/Initiative: Develop an IT Master Plan

Sponsor: Chris Moore

Project Manager: Andy Best

Status: <u>On-Track</u> – A detailed 5-year IT Master Plan (Strategic Plan) is currently in development with plans for completion in November 2024. The emerging plan has three phases for delivery over the next 5 years. The phases are 1) Align, 2) Optimize and 3) Perform. Detailed recommendations have been developed for each phase with clear guidance and direction for the IT Manager to execute.

Project/Initiative: Establish System Owners

Sponsor: Armando Narvali

Project Manager: Ravneet Gill

Status: <u>Planned</u> – Work on this initiative is planned for 2025 as part of the work Information Technology is leading on the development of an Application Lifecycle Model. This initiative will be incorporated into the Architecture and Planning work IT will be engaged in moving forward.

It will also be supported by the Business Relations Management model to be implemented. All application (software) used across the Town will be categorized and classified with clear ownership, roles, and responsibilities of owners. This work has been referenced in the IT Strategic Plan and the related roadmap of work to be completed.

Project/Initiative: Enhance Payroll Automation

Sponsor: Antonietta Minichillo

Project Manager: Systems & Application Support Specialist

Status: <u>Planned</u> – In early 2024 an external consultant was hired by the Town to review the use of the Dayforce system and to identify ways in which the system could be optimized within the Town. The report identified several initiatives to enhance performance and address outstanding issues experienced by the Town and its supervisors/managers and staff. We will work to remedy as many of the issues that resourcing permits. Efforts have been made to prioritize the investments needed for the Dayforce system enhancements.

Project/Initiative: Digitize and Automate Approval Processes

Sponsor: Chris Moore

Project Manager: Andy Best

Status: <u>On-Track</u> – Phase one of this project has been completed and has delivered an easy-to-use electronic signature solution leveraging the existing Adobe software platform that the Town uses. The project supported the development of e-signature processes for the Clerks, Human Resources and Finance divisions. A simple user guide has been developed and training is available for individuals creating or signing off on automated processes. During Phase two the project manager will work with the Town's managers to implement an approved automation plan for the next set of business processes identified as "priority" automation targets.

Project/Initiative: Digitize Historical Permits and Inspection Data

Sponsor: Naythan Nunes

Project Manager: TBD

Status: <u>Planned</u> – In preparation for digitizing historical permits and inspection data the Town has been working towards implementing a new building/permitting automated system. The new system has been identified and is in the planning stages of development for implementation in 2025. The Manager Building and Chief Building Official is working on a plan to scan and store existing information to both align with and integrate with the new system and act as a digital archive to preserve information and reduce the dependency on paper documents. It is anticipated that the digitizing of permits and inspection data will be completed in 2025.

Project/Initiative: Develop a Data Strategy

Sponsor: Chris Moore

Project Manager: Andy Best

Status: <u>Planned</u> – This project is planned to start in April 2025.

Project/Initiative: Develop a Fleet Management Plan

Sponsor: Tim Kocialek

Project Manager: Ryan Ondusko

Status: <u>On-Track</u> – The first phase of the Fleet Management Plan was to seek Town Council's approval to transition from the fleet leasing program to an ownership model

where the Town owns and manages all its fleet assets. The report titled "Fleet Ownership Strategy" was approved by Council on September 9th, 2024. The Manager Public Works is working on the next steps of the transition to ownership which will include a full and robust fleet management plan. Currently meetings are taking place with all internal users of the Town fleet to capture current and future fleet requirements.

Project/Initiative: Land Mobile Radio

Sponsor: Mike Richardson

Project Manager: Chris Moore

Status: <u>On-Track</u> – The current radio system in use by Orangeville Fire Services is approaching the end of life and requires an upgrade. Upgrading the radio system allows Fire Services to address the current challenges, issues, and risks with the existing radio system. Town staff are working to procure an upgrade with implementation planned for first half of 2025.

The 62 Additional Opportunities

When Blackline completed their analysis and compiled the opportunities to enhance Town operations, 72 items were identified. As much as the Top 10 and the additional 2 projects are priorities for the Town, the additional 62 opportunities are just that, "opportunities".

These items were identified by staff, and it is important to not lose sight of them and ensure they are addressed. Many of these opportunities are the responsibility of various managers across the Town. The following summary provides a high-level status of these items.

This chart summarizes the 22 opportunities that are "Closed" and have been addressed, it also highlights the 15 that are currently "Open". For the remaining 25 yet to be addressed, please see the "Additional 25 Opportunities" chart below which documents these items, their related initiatives, and proposed timelines.

Opportunity Status by Department

Department	Closed	Open
Community Services	6	4
Corporate Services	12	4
Infrastructure Services	4	7
Totals	22	15

Next Steps

Beyond the initial 37 that have been actioned or are in process of being addressed there are still 25 more opportunities to be reviewed. The following table identifies the number of items by "Related Initiative" and the proposed years in which the items could be addressed.

Additional 25 Opportunities

Related Initiative	Delivery Years	Total Opportunities
GO – People Plan	2025 - 2026	4
Organizational Effectiveness	2025 - 2027	4
Customer Service	2025 - 2027	5
IT Strategic Plan	2025 - 2027	12
Total		25

Divisional Managers will continue to deliver on open and in progress opportunities. SI will support as needed and continue to deliver on their 2024 workplan. Strategic Initiatives has met with each of the General Managers to review the additional 25 opportunities and determine if they are still a priority to be addressed.

A similar status report will be provided in June 2025 to update on progress.

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Corporate Implications

This report will not generate direct implications. If future actions related to this report will have a corporate impact, a report will be presented to Council for approval, if required.

Conclusion

The Town administration continues to find value in addressing and delivering solutions related to the 72 opportunities that Blackline identified in the 2023 report. Significant progress is being made by the Managers across the Town as well as the SI team in delivering on both the priority items as well as other key opportunities. Progress is being tracked to ensure that we leverage every opportunity to the Town's advantage.

The solutions that are being developed and implemented are enhancing the operation of the Town, stabilizing the foundation, and providing a clear path towards managing future growth in a sustainable and economical way.

Strategic Alignment

Strategic Plan

Strategic Goal: Corporate Capacity

Objective: Innovation

Notice Provisions

Not Applicable

Respectfully submitted,

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Attachment(s):   Not Applicable