MAXIMIZING THE TOWNS POTENTIAL IN A DIGITAL WORLD

SERVICE DELIVERY REVIEW

(THIRD-PARTY REVIEWER'S - FINAL REPORT)

November 12, 2020

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PROJECT OVERVIEW

SERVICE MODERNIZATION THROUGH STRUCTURED ANALYSIS

INTRODUCTION

The Town of East Gwillimbury has a tradition of implementing practices and initiatives to ensure programs and services are delivered to residents in the most cost-effective manner. Since 2009, the Town has undertaken an organizational review approximately every three years. In addition, the Town has been creative in soliciting staff input regarding opportunities for positive change. In 2012 for example, the Town undertook an initiative called "Employees Generating Savings" in which all staff were engaged to submit suggestions to improve services and save money. Since 2015 the Town has built an "in year savings target" into its annual Business Plan and Budget. Budget savings to date through this approach total more than $2,000,000, coming largely from gapping of vacant positions, seeking out new revenue sources and improved procurement practices.

In 2018, the Town increased its focus on modernization and business transformation. Working with Diverse Systems Group, the Municipal Peak Performance Program (MPPP) was established. This program, centered around people, processes and technology, enabled the ongoing identification of opportunities for positive change and a standardized approach to planning, managing and reporting on projects and initiatives. It also included the establishment of a Business Solutions Advisory Team (BSAT) made up of identified change agents from across the organization. Finally, it involved the creation of a culture statement which included four corporate commitments supporting a working environment for all staff in which creativity and innovation, collaboration and partnerships, lifelong learning and a commitment to positive customer experiences became fundamental expectations for all.

This report provided herein represents the Service Delivery Review undertaken for the Town of East Gwillimbury by the Diverse Systems Group. This report has been prepared as a result of a coordinated effort between Town staff and DSG resources and builds on the previous initiatives noted above.

INTRODUCTION

The objective of this Municipal Services Delivery Review is to improve the understanding of the services delivered by the Town of East Gwillimbury and provide information that will assist Council and staff to make informed strategic choices regarding those services. The data compiled in this report underscores opportunities to improve services by focusing on many factors including, potential process improvements, training of staff, technology related improvements, and how the availability of information can further enhance service performance. Our focus was to document opportunities to improve a service while also lowering the cost of service delivery, if possible. The information contained in this report was formed by working with service leads to develop a detailed inventory of services and related service improvement ideas.

Ultimately, the transformation of municipal services depends on the degree in which, staff would support service changes. As part of our engagement we examined the state of "change readiness" across the organization. Utilizing the Project Management Institute's (PMI) "The Case for Change Readiness" methods, a high-level review of staff was conducted to assess their natural propensity to accept change and to understand the potential impact on additional supports that may be required. This information is crucial when developing change management plans to implement future service improvement ideas. Working with department leads and service managers, the project team documented more than 250 inputs and suggestions of which almost 85% included new and innovative service improvement ideas. The inputs were categorized into top priorities by department and branch and were also analyzed by the Town's Business Solutions Advisory Team (BSAT) who also developed a top 10 list of preferred service improvement ideas. A full listing is contained in Appendix A.

Managing wide-scale service changes requires a vast amount of resources (people and financial) and is best done in iterations and over a longer period. To this end, we present the service improvement ideas and our recommendations in an interactive approach that will permit the Town to implement these changes over the next 2-3 years.

OVERVIEW

Under the Municipal Modernization Program, the province made up to $125 million available through 2020-23 to help rural municipalities conduct service delivery reviews, implement recommendations from previous reviews and undertake a range of projects, such as IT solutions or process improvements, to achieve cost savings and efficiencies.

Eligible projects under Intake 1 are reviews of municipal service delivery expenditures by independent third-party reviewers. Under future intakes of the program, municipalities will have the opportunity to apply for projects aimed at implementing service delivery efficiencies to achieve cost savings, in addition to service delivery reviews.

Early in December 2019, the Town applied to the Province for funding support. The Town received approval in February 2020. Based on its long-standing and value-based relationship, the Town designated Diverse Systems Group (DSG) as its independent service provider that would perform a service delivery review (SDR) for the municipality.

Changes to municipal operations due to COVID-19 affected original SDR project dates. Original report submission dates were extended by approximately six months. The current date the Town is required to submit its final report to the Province is December 4, 2020.

EAST GWILLIMBURY'S MODERNIZATION JOURNEY

- Early in 2018 the Town's modernization journey started with an assessment of IT systems to determine the extent to which information was being shared across the organization.

- The Business Solution Advisory Team (BSAT) was established to build culture, people readiness and prioritize new initiatives.

- Early in 2019 the Town received $725,000 of the Provincial Investment in Small and Rural Municipalities grant funding which established the Town's current Modernization program.

- The Town and DSG developed the Municipal Peak Performance Framework to assess modernization opportunities.

- In Fall 2019 Council approved the first wave of eight modernization initiatives.

- In March 2020 the Province awarded the Town $85,000 towards a Municipal Service Delivery Review (SDR) Project.

- In May 2020, DSG initiated the Town's independent third-party review of services.

- In November 2020, DSG presented an overview of the SDR to Council.

- December 2020, the Town will issue its final SDR report to the Province.

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METHODOLOGY & PROCESS

ANALYSIS USING PROVEN PRACTICES

WHAT IS A SERVICE DELIVERY REVIEW?

A service delivery review (SDR) is a systematic review of municipal services and programs to determine the most appropriate way to deliver them. It focuses on setting priorities and where possible, finding new, more cost-effective ways to deliver the services the municipality has determined it wants or needs to continue providing.

A service delivery review is a rigorous evaluation process that asks questions such as; "[1]"

- Do we really need to continue to be in this business/service?

- What do citizens expect of the service and what outcomes does Council want for it?

- How does current performance compare to expected performance?

- How is demand for the service being managed?

- What are the full costs and benefits of the service?

- Are there alternative/better ways to deliver the service?

Main Objectives

- Identify current practices in service delivery.

- Identify existing practices that assist in providing services efficiently.

- Identify potential opportunities to provide municipal services more efficiently.

Credits: [1] A Guide to Service Delivery Review for Municipal Managers, Ministry of Municipal Affairs

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MUNICIPAL PEAK PERFORMANCE PROGRAM

The Municipal Peak Performance (MPP) program is a proven municipal service improvement framework that streamlines analysis, prioritization, planning and implementation of new municipal services.

The simplified processes save time and reduce the burden a project will have on staff and stakeholders. Staff gain valuable insights that are transferable to service improvement programs in the future.

Encompassing a wide range of management tools including Key Performance Indicators (KPI), performance measurement, process management, project management and benchmarking.

Our Municipal Peak Performance (MPP) program is based on the Project Management Institute' Project Management Body of Knowledge (PMBOK), Capability Maturity Model Integration (CMMI) and aligned with the Ontario government's "A Guide to Service Delivery Review for Municipal Councilors (Ontario, 2010)".

| Reduce overall cost of service delivery | Maximize use of staff knowledge, to transform your organization | Deliver efficient and customer focused services | Build an agile organization that can adjust when environmental factors change | Become an organization that embraces change and values varying perspectives | Recognition for being an innovative municipality |

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SERVICE DELIVERY REVIEW FRAMEWORK

Creating a culture that supports the development of People, Process and Technology to achieve a desired future state.

- **Culture:** create a workplace environment, customs and commitments that enable people, processes and technology to come together to achieve peak performance and optimized service delivery.

- **People:** improve services through the transmission of knowledge and information across the organization.

- **Process:** analyze workflows and improve the use of operational data to enhance services.

- **Technology (tools):** optimize the use of information and technology to deliver innovative municipal services.

People

Culture

Technology   Process

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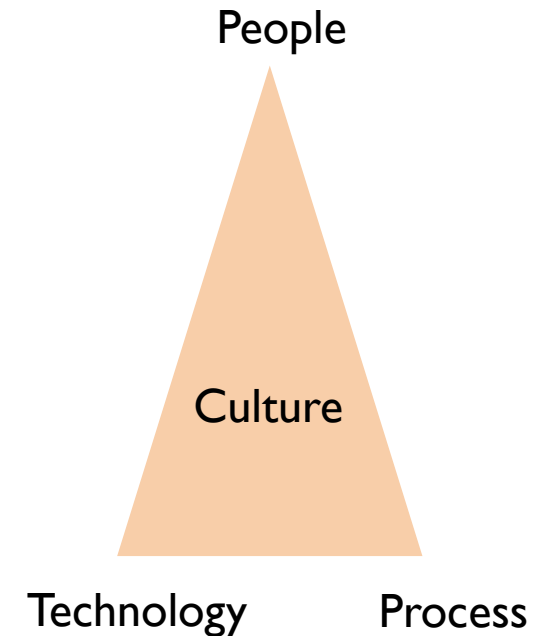
MPP SIX STEP PROCESS

STEP ONE

Current Information Management Systems Analysis

- Inventory of software systems, contracts, contact information
- Inventory of features per system indicating used or unused

STEP TWO

Creation of a Business Solutions Advisory Team

- Identification of innovators and creative change agents from across the organization
- Creation of mandate, expectations and schedule

STEP THREE

Business Process Review

- Identification of Major Business Processes
- Documentation of Major Business Processes

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MPP SIX STEP PROCESS

STEP FOUR

Gaps, Opportunities and Analysis

- System Integration
- Identification of Feature Utilization
- People Planning
- Targeted Training and Development

STEP FIVE

Implementation Plan and Reporting

- Creation of project brief, budget, and resource requirements
- Project schedule, milestones, and status reporting

STEP SIX

Culture Creation and Shift

- Development of Desired Commitments that define the Desired Corporate Culture
- Creation of Corporate Culture Statement
- Implementation Plan to realize and maintain the defined Culture

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BUSINESS SOLUTIONS ADVISORY TEAM (BSAT)

The Business Solutions Advisory Committee (BSAT) make recommendations to SMT on matters of business process improvements, new service opportunities and business solution priorities, to improve business efficiency.

Characteristics:

- "Change Champions" who are open-minded and impartial;

- Ensure stakeholders needs and impact are considered;

- Recommend opportunities to improve processes and access to information across the organization;

- Seek opportunities to collaborate with other municipalities & agencies to improve our processes and solutions;

- Provide the SMT with recommendations that influence future decisions related to process improvements, resources and services.

Duties:

- Work with subject matter expert's to document service improvement opportunities;

- Recommend ways to improve service levels, processes and decision making.

- Find opportunities to remove duplication of effort.

- Recommend ways to improve information management and reporting.

- Work with other staff/departments to improve business efficiency;

- Manage matters referred to the BSAT by the SMT.

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METHODOLOGY & SUCCESS CRITERIA

Methodology

Our program methodology encompassed a combination of documentation reviews, consultations, focus groups, interviews, system walkthroughs, benchmarking, and data analysis. This work was undertaken over a 5-month period commencing May 2020 with an interim report delivered to the Province in June 2020. A draft report noting the service improvement opportunities and our recommendations was presented to the SMT, the Steering Committee and the Town's Business Solutions Advisory Team in October 2020. The recommendations were also presented to Council in November 2020. Updates to this final report include comments and recommendations from these groups.

Report Success Criteria

- An in-depth understanding of current services and service delivery methods.

- Provision of actionable recommendations and ideas for how to improve services.

- Buy-in among internal stakeholders and BSAT that the recommendations are aligned to the Town's needs and will reduce operational costs and improve service delivery.

- A roadmap and budget estimate to provision priority-based service changes.

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HIGH-LEVEL PROCESS & KEY DATES

1. Conduct stakeholder interviews across the organization and end-user community (BSAT);

2. Inventory & classify municipal services by department, service type and document stakeholder feedback & business priorities;

3. Evaluate the extent to which proposed services align with the municipal strategic values and priorities;

4. Define the various services, delivery models, costs and resident impacts / benefits;

5. Assess alternative service delivery models and possible changes to the level of service;

6. Document opportunities to be more efficient and effective in the sustainable delivery of the identified service (Looking at people, process & technology);

7. Develop a roadmap to guide the municipality through a multi-year service modernization program (with high-level cost data).

Milestones	Date (s)
Provincial Approval of Project	January 2020
Service Lead workshops (develop service inventory)	May – September 2020
Socialize findings (SMT, EMT, BSAT)	October 5 - 21, 2020
Socialize Findings (members of Council)	November 9 - 13, 2020
Council update	November 17, 2020
Submit draft report to Province	November 13, 2020
Submit final report to Province	December 4, 2020

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STAFF WORKSHOPS – COMPREHENSIVE ANALYSIS

- Our approach sought staff opinions, knowledge, experiences, and beliefs about the services they provide. One-on-one interviews and small team workshops were chosen to secure the necessary in-depth information required. Participants were engaged in structured and confidential discussions lasting approximately 45 minutes on average.

- Due to COVID-19 social distancing protocols, most of the interviews were conducted via virtual meetings (MS Teams). Several follow-up sessions were required to confirm specific details and or clarity on a specific matter.

- Interviews with the following candidates were conducted between July and September 30, 2020. In total over 40 staff were involved in the process and a total of over 60 hours of consulting time was devoted to these workshops.

Department	Participants
CAO's Office	Tom Webster, Gail Moniz
Human Resources	Michelle Collette, Erin Smyth, Chris McPherson
Community, Infrastructure & Environmental Services	Mike Molinari, Larry Hollett, Paul Neuman, Jeff Meggitt, Denny Boskovski, Kevin Brake, Patrick Laforest, Robert Meek, David Dodwell
Community Parks, Recreation & Culture	Aaron Karmazyn, Frank Mazzotta, Rhonda Pogue, Chris Catania, Simon Latam, Grant McKeich
Corporate Services	Mark Valcic, Warren Marshall, Laura Hanna, Val Adema, Carolyn Brown, Randy Bell, Mike Gerrior, Heather Sherk, Carolynne Saxton, Danielle Verneuil
Development Services	Marco Ramunno, Andras Szönyi, Lawrence Kuk, Andrea Staples
Emergency & Community Safety Services	Rob McKenzie, Ryan Jagoe, Emily Mason
Legal & Council Support Services / Clerks	Dean Horner, Janet Gates, Jennifer Nichols, Fernando Lamanna, Tara Lajevardi

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BENCHMARKING & PERFORMANCE

OVERVIEW OF CURRENT STATE

ORGANIZATIONAL CONTEXT

This review looked at three area of focus to assess current organizational state and readiness for modernization and transformation.

1. Resident and stakeholder engagement and satisfaction

2. Employee engagement and satisfaction

3. Relative fiscal position

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BENCHMARKING & PERFORMANCE - OVERVIEW

There's a reason organizations invest in research and analysis. It provides meaningful conjecture and tells you how you are doing relative to other organizations in the same sector. It is important to have this context when looking at opportunities and setting priorities.

Objectives:

- Seeking opportunities to adapt successful examples of service improvements while evaluating cost-reduction techniques.

- Comparing service levels and uncovering gaps to help improve the Town's service delivery capacity.

 Considerations:

- The Town's relative fiscal position.

- Programs need to have staff engagement and be directly involved the prioritization, design and implementation of service changes.

- That their budgets are constrained and want to make smart, forward-looking changes.

- That new technologies and approaches are driving efficiency and effectiveness at the service level and they want to participate in it.

ORGANIZATIONAL CHANGE READINESS

Organizational change readiness is a highly subjective concept, subjective in degree, and subjective in the eye of the beholder. What and who needs to be ready? How ready is ready enough? And whose viewpoint should be used when judging readiness? One of the critical success factors in successfully implementing service improvement changes identified through the Service Delivery Review is the "change readiness" of the people within the organization. The information helps us understand, at a high level, where the organization has high probability of success and areas that may require additional change management support to roll out new programs in their service area.

Change Readiness Guidelines

Financial: Can we afford the change? (i.e. How much budget is available?)

Human Resources: Are we appropriately staffed to handle the change? What resources are needed at what capacity and for how long to get through a normal learning curve? What resources (internal and external) are needed to provide support to those going through the change and for how long?

Service Levels: What controls are in place to ensure service expectations remain at acceptable levels? (e.g. customer satisfaction, quality, response times, etc.)

Stakeholders: What is their understanding of the changes, what do they need to do differently, possible barriers and how they feel about new ways of working.

Three key drivers that impact readiness:

Cultural readiness: the degree of alignment between cultural norms and the proposed change.

Commitment readiness: the degree of resolve and ability of the organization, through its leaders at all levels, to see the change through to successful and sustainable completion within the organization's overall strategic agenda.

Capacity readiness: the degree to which the organization is able to bring supportive work processes, historical knowledge and experience, current knowledge, skills and abilities, and resources to bear to aid in successful implementation and sustainability of the change.

RESIDENT / STAKEHOLDER ENGAGEMENT, SATISFACTION AND FEEDBACK

Customer Service tracking from August 2019 to pre-COVID 2020

Survey Data

- 85% of residents indicated that "everything [was] resolved to [their] satisfaction today"

- 15% who were unsatisfied related to two main areas:

    - Online access to accounts / payments

    - Program concerns (parking, water quality)

Based on 1500 interactions

Modernized Service Delivery Requests

1. Online payment options *

2. Option to view account activities balances and summaries online *

* addressed under modernization program

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RESIDENT / STAKEHOLDER ENGAGEMENT, SATISFACTION AND FEEDBACK

Customer Service communication tactics with residents:

1) Weekly Town Page (page in the paper)
2) Weekly eNewsletter
3) Digital signs at facilities
4) Road signs – key topics /locations
5) Social Media (Facebook/Twitter)
6) Town website
7) Monthly Mayor Columns in Snapd
8) Monthly Mayor Column and ads of significance in the Bulletin
9) Geofencing online advertising
10) Mail Outs for items of major town-wide significance

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Average Scores out of 5			
Area	**Organization**		
	2011	2015	2018
Benefits/Compensation	3.13	3.14	3.53
Recognition (Individual)	3.25	3.58	3.57
Recognition (Team 2018)	n/a	n/a	3.62
Performance Mgmt	3.72	3.55	3.45
Training/Organizational Dev	3.66	3.92	3.61
Healthy Work Environment	3.97	4.12	4.05
Supervisor	3.88	4.14	4.21
Colleague Cohesion	3.76	4.01	3.98
Leadership (EMT & SMT)	3.13	3.47	3.65
Organizational Communicat	3.65	3.65	3.81
Employee Involvement	3.1	3.3	3.65
Corporate Culture	n/a	n/a	3.99
Overall Satisfaction	3.81	3.97	4.06
Improvement vs 2015			
Decrease vs 2015			

As per employee engagement survey 2018

- The Town has a history regularly surveying staff satisfaction.

- Employee participation rate through the survey is + 90%.

- Overall results indicate high levels of employee satisfaction.

- The majority of areas surveyed have maintained or improved over time.

- There are a few areas denoted (yellow) that have experienced slight declines in ratings. However still demonstrates high levels of satisfaction (70% +).

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Average Scores out of 5		
Area	**East Gwilimbury**	**Municipal Avg**
	2018	33 municipalities
Benefits/Compensation	3.53	3.46
Recognition (Individual)	3.57	2.7
Recognition (Team 2018)	3.62	2.64
Performance Mgmt	3.45	2.52
Training/Organizational Development	3.61	3.49
Healthy Work Environment	4.05	3.52
Supervisor	4.21	3.66
Colleague Cohesion	3.98	3.97
Leadership (EMT & SMT)	3.65	2.38
Organizational Communication	3.81	2.85
Employee Involvement	3.65	2.58
Corporate Culture	3.99	
Overall Satisfaction	4.06	

- Survey results indicate an overall healthy work environment.

- Survey results show higher levels of employee satisfaction compared to the municipal average in every category.

- There is a strong corporate culture and overall satisfaction level.

As per employee engagement survey 2018

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POTENTIAL BARRIERS TO SUCCESSFUL CHANGE

Barrier	Mitigation Strategy
Labour agreements and contractual obligations	Early and ongoing engagement to demonstrate operational impact, benefits and prioritization of actions and initiatives
Normal human resistance	Share your vision. Open honest discussions with staff about benefits, their role and what the future state will look like
Pressures of day-to-day events	Monitor operational events and seasonal workloads to measure effects on staff and adjust priorities accordingly
Scarce resources	Understand which resources are in short supply and agree on a common approach to prioritizing work across shared resources
Inadequate planning processes	Prioritize project management skills to enhance project planning, and resource planning
Incomplete information and changing circumstances	Focus on scope management, stakeholder management, progress reporting and communications

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ORGANIZATIONAL CHANGE READINESS

| Criteria	Characteristics
Change Champion	Can lead and be a catalyst for change
Change Participant	Will actively participate in and embrace change
Change Challenge	Won't likely undermine change however may struggle with change and will require significant training and support
Change Resister	Is likely to actively resist change and resist new processes and technologies

Change Readiness Assessment

Total Assessed: 142
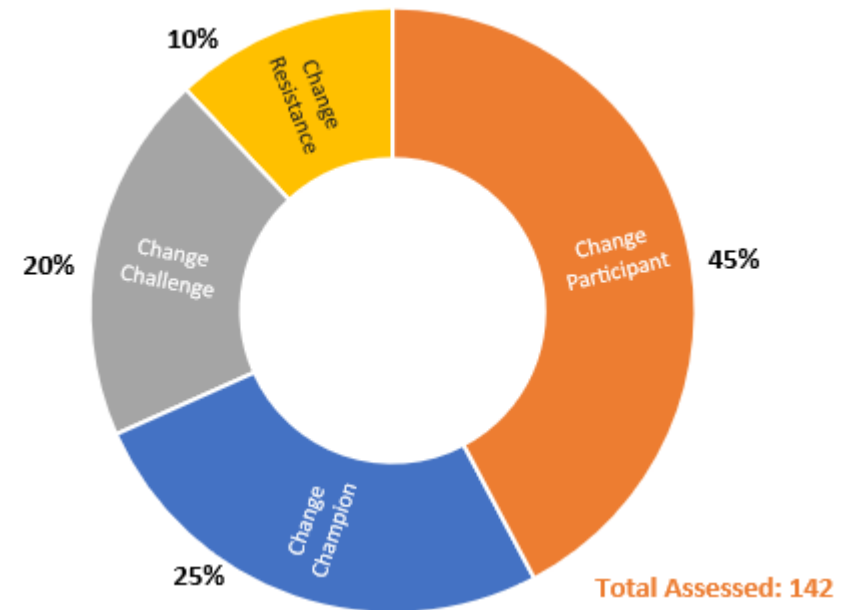
CHANGE READINESS - FINDINGS

- Primarily a flexible and adaptive non-unionized workforce

- Change champions are generally dispersed throughout the organization

- The majority of staff are naturally inclined to support change

- The organization has an above average ability to identify, plan and implement change successfully

- Degree of readiness is above average

- Staff seek to implement best and common practices in the design and execution of services

- Strong trend towards using internal staff to provide services

- Desire to further enhance and collaborate with N6 partners

- Overall sentiment is that the organization provides quality services

- Staff feel appreciated, that they have a voice, and their ideas are valued

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BUILDING A CULTURE OF INNOVATION & EFFICIENCY
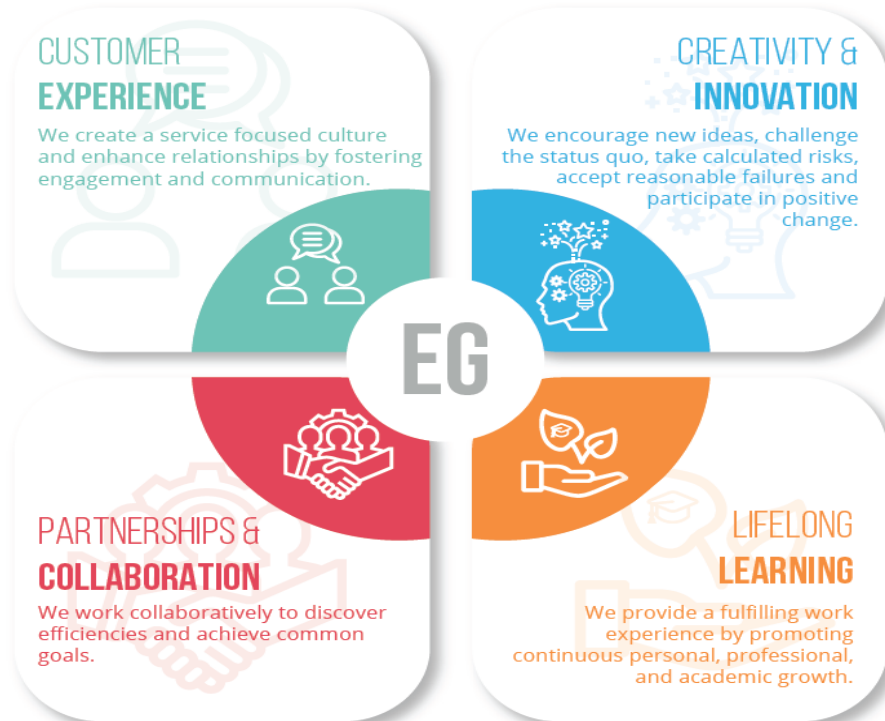
Describes the corporate culture through four commitment statements focusing on:

- Customer experience

- Creativity and innovation

- Partnerships and collaboration

- Lifelong learning

The corporate culture statement and commitments are designed to support employee and team performance.

OVERVIEW OF FINANCIAL POSITION

- The Town is in a strong fiscal position.

- Unlike most municipal comparators, the Town is debt free.

- The Town's reserves have continued to grow as a result of effective Council governance and leading administrative practices.

- The overall municipal cost of living is the lowest in York Region and is 12% lower than the average.

- The Town has initiated significant investment in modernization and transformation initiatives by leveraging provincial grant and development fee revenue sources.

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COMPARATIVE OUTSTANDING DEBT PER CAPITA

Town of East Gwillimbury - Service Delivery Review
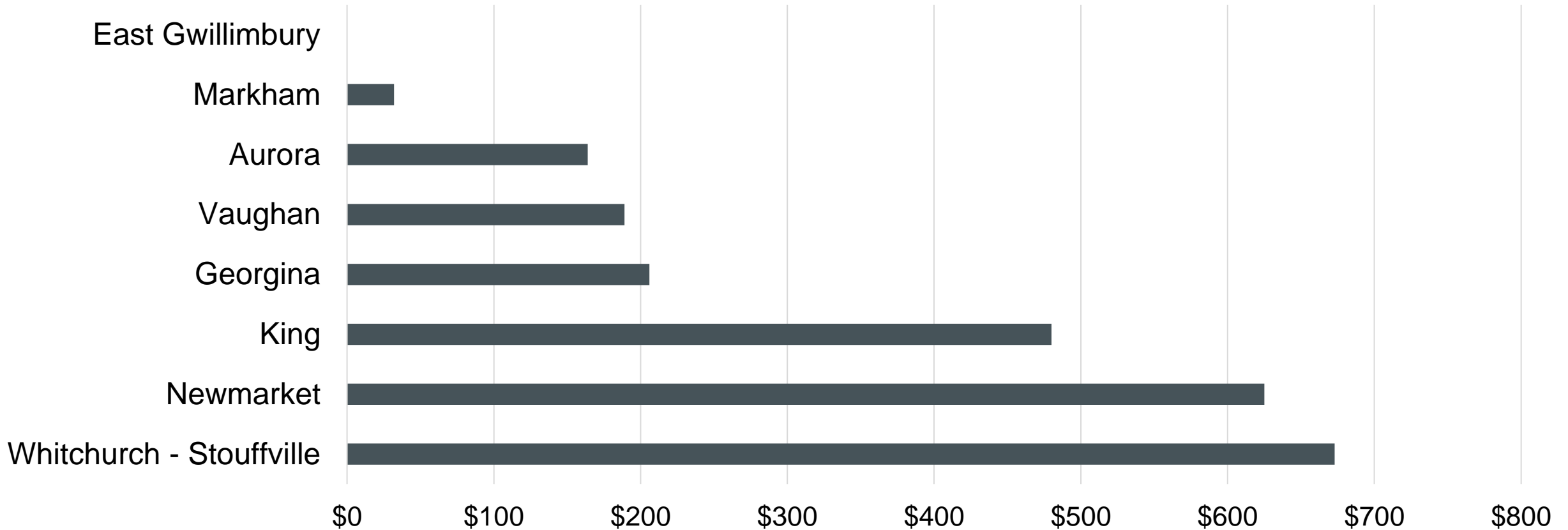
COMPARATIVE RESERVE POSITION

Total Reserves per Capita

- East Gwillimbury
- Aurora
- Vaughan
- King
- Georgina
- Newmarket
- Markham
- Whitchurch-Stouffville

$0 $500 $1,000 $1,500 $2,000 $2,500

Tax Reserves per Capita

- East Gwillimbury
- Aurora
- King
- Georgina
- Vaughan
- Whitchurch-Stouffville
- Markham
- Newmarket

$- $500 $1,000 $1,500 $2,000

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Town of East Gwillimbury - Service Delivery Review

32

Source: 2019 BMA Study
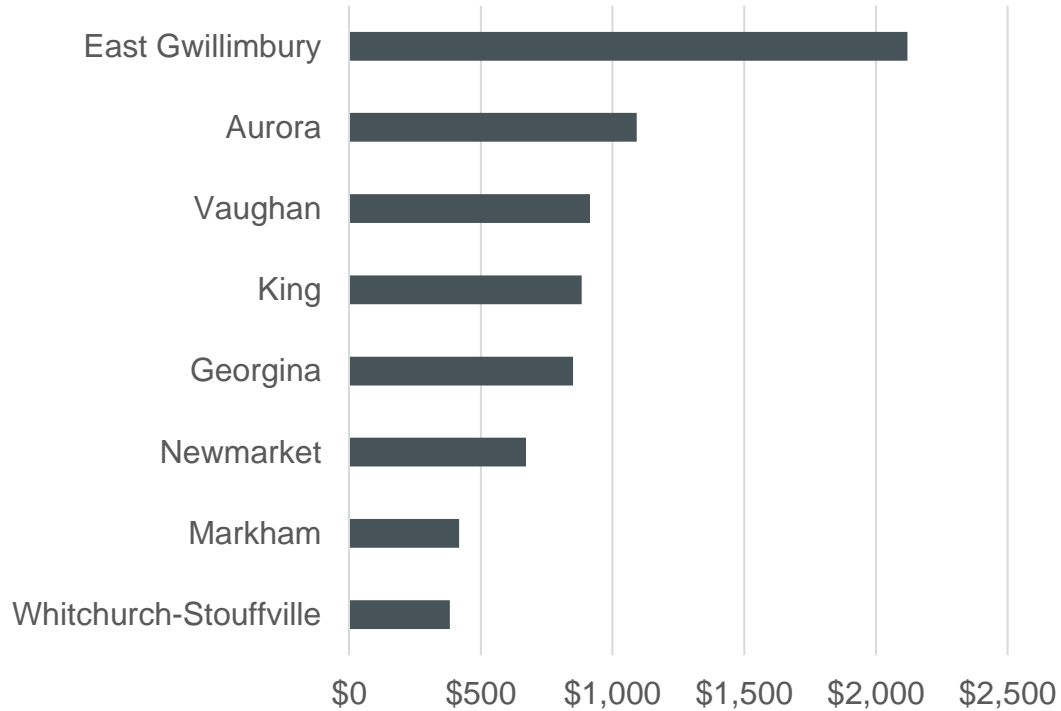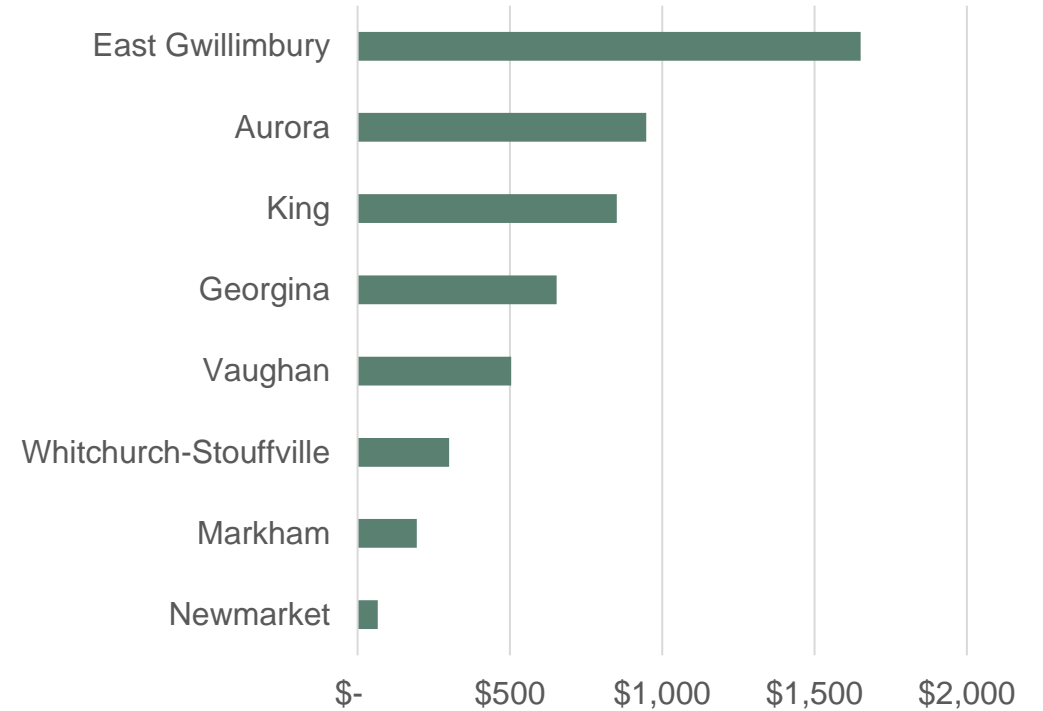
2021 PROPOSED BUSINESS PLAN AND BUDGET

Lowest Relative Taxes in York Region

Based on 2019 Property Taxes – Two Storey Detached House

25%

12%

12%

Source: BMA Municipal Study, 2019
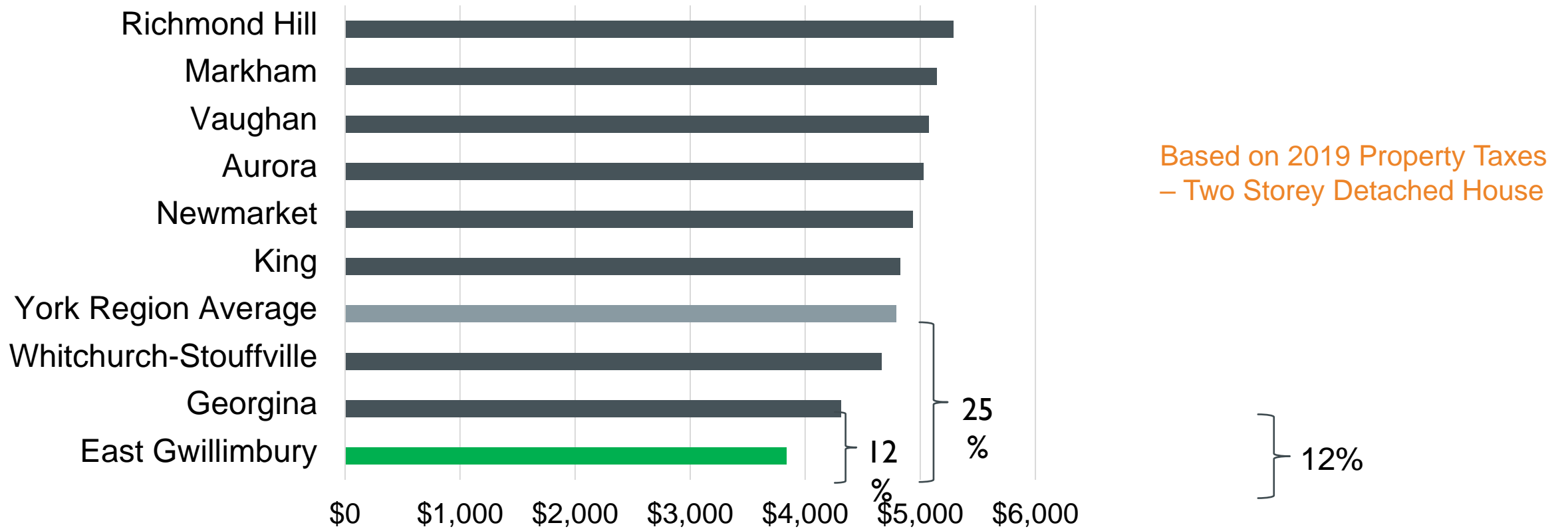
2021 PROPOSED BUSINESS PLAN AND BUDGET

Municipal Cost of Living Comparison
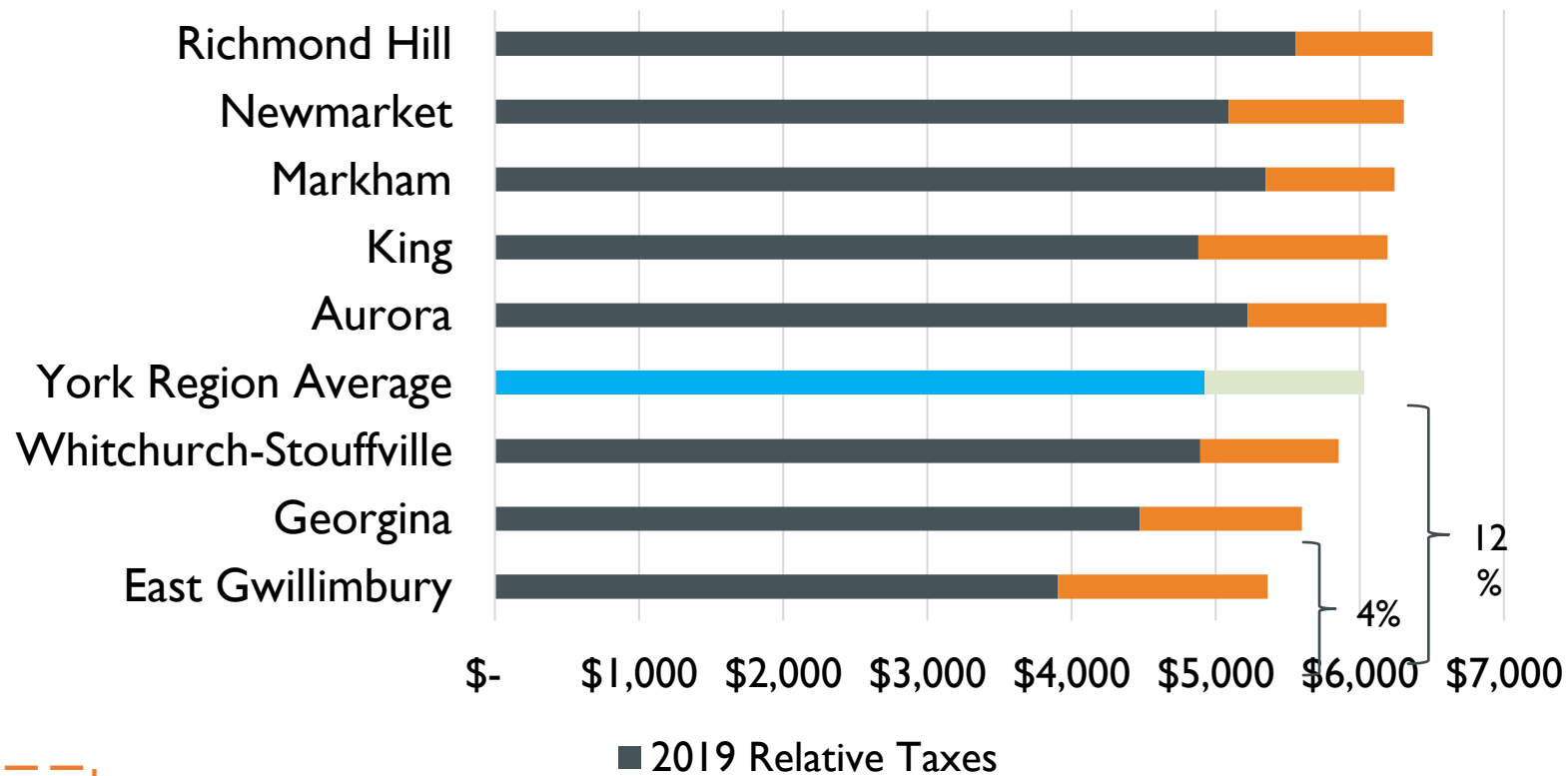
Based on 2019 Property Taxes – Two Storey Detached House and Average Water and Sewer Costs

■ 2019 Relative Taxes

Source: BMA Municipal Study, 2019

2021 PROPOSED BUSINESS PLAN AND BUDGET

Projects related to Modernization and Transformation since 2019

Working Capital, $30,000, 2%

Investment of **$1.3M** in transforming business processes

Building Reserve, $500,000, 39%

Modernization Grant, $750,000, 59%

Town of East Gwillimbury - Service Delivery Review

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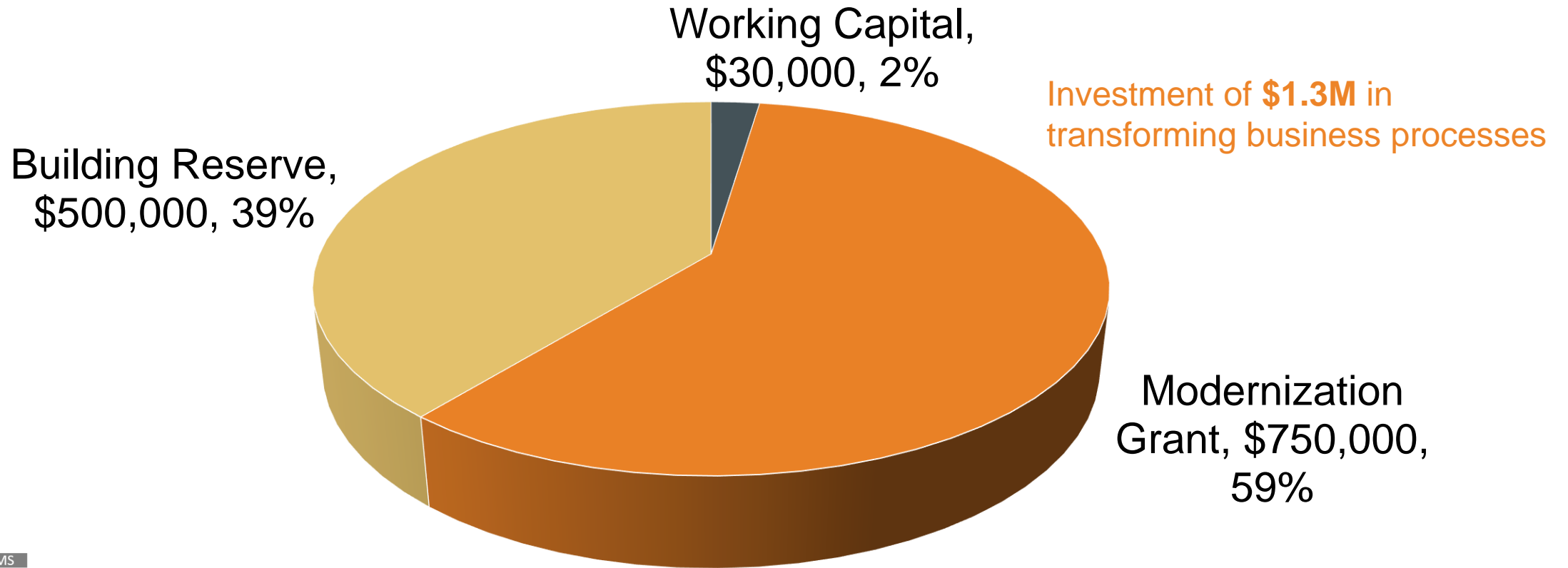
OPPORTUNITIES AND PRIORITIZATION

PRESENT AN INVENTORY OF OPPORTUNITIES

SITUATIONAL ANALYSIS

A SWOT analysis was utilized to organize the findings as follows:

- **Strengths:** Current best practices and examples of what the municipality currently does to provide efficiencies.

- **Weaknesses:** Areas where service delivery could be improved.

- **Opportunities:** Activities for which the recommendations are based. These include next steps that may increase service levels, decrease costs, or provide areas for further review.

- **Threats:** Potential changes to legislation or perceived issues with respect to service delivery.

Strengths   S
- Strategic plan prioritizes service quality & innovation
- Staff aspire to offer efficient and quality services
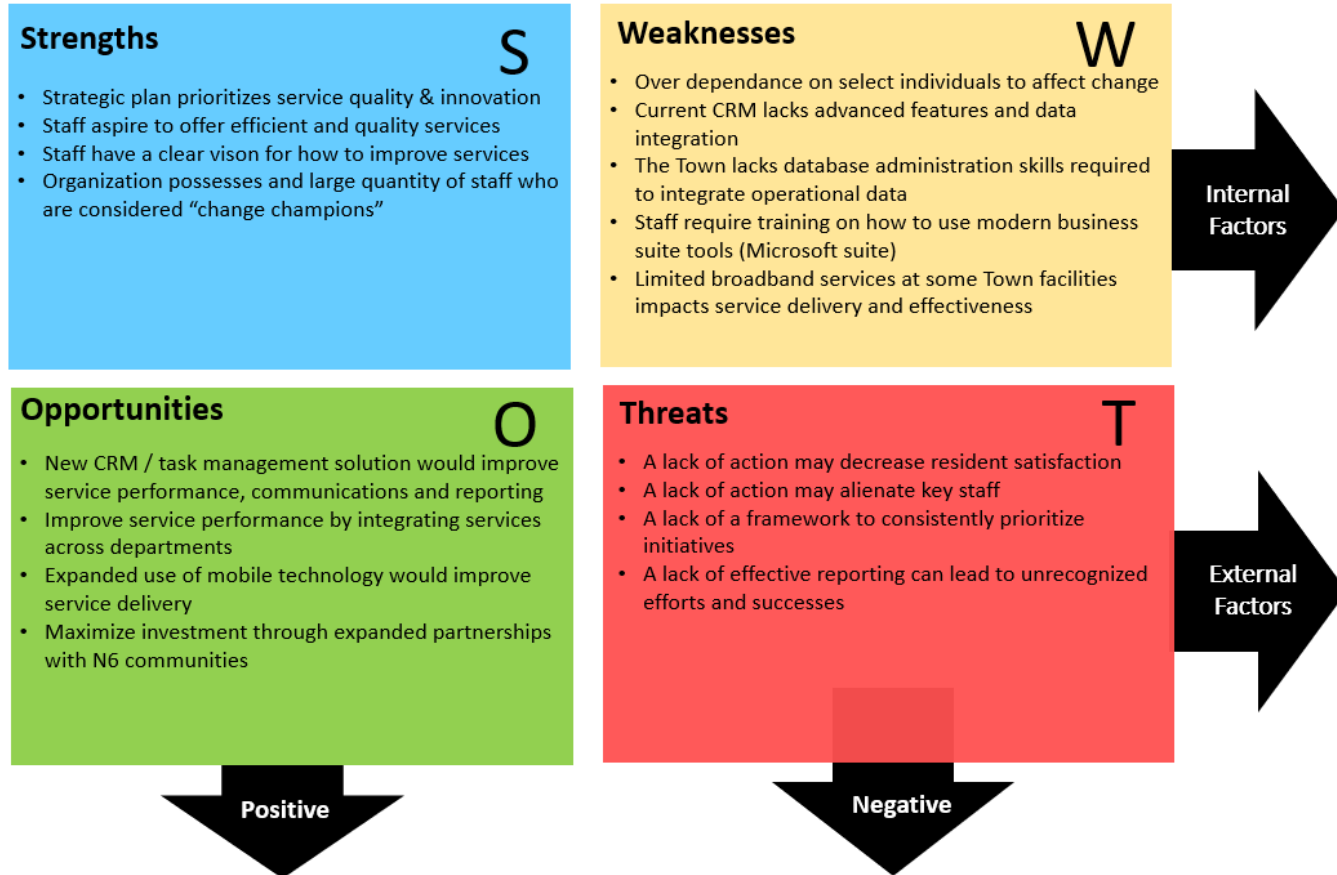- Staff have a clear vison for how to improve services
- Organization possesses and large quantity of staff who are considered "change champions"

Weaknesses   W
- Over dependance on select individuals to affect change
- Current CRM lacks advanced features and data integration
- The Town lacks database administration skills required to integrate operational data
- Staff require training on how to use modern business suite tools (Microsoft suite)
- Limited broadband services at some Town facilities impacts service delivery and effectiveness

Internal Factors

Opportunities   O
- New CRM / task management solution would improve service performance, communications and reporting
- Improve service performance by integrating services across departments
- Expanded use of mobile technology would improve service delivery
- Maximize investment through expanded partnerships with N6 communities

Threats   T
- A lack of action may decrease resident satisfaction
- A lack of action may alienate key staff
- A lack of a framework to consistently prioritize initiatives
- A lack of effective reporting can lead to unrecognized efforts and successes

External Factors

Positive

Negative

OVERVIEW

An inventory of opportunities that should be considered by Council and senior administration in prioritizing, planning, scheduling and budgeting ongoing initiatives within the modernization and transformation program.

1. Major modernization projects completed to date

2. Modernization changes in progress

3. Modernization opportunities for the future (see recommendations)

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PEOPLE RELATED OPPORTUNITIES

Increase the use of cross functional project-based teams

Implement training programs and initiatives to support effective change management

Increase training programs to support the effective use of technology

Ensure staffing and resourcing levels are responsive and reflective of service demands using the shamrock model

Promote service delivery improvement within individual performance plans

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PROCESS RELATED OPPORTUNITIES

Prioritize processes, projects and initiatives

Standardize methods, documentation, operating procedures, and communications

Continue to define and track service performance metrics and KPI's

Improve ability to manage, track and report on customer inquiries and work orders

Increase availability of resident self-serve system features to obtain information, acquire services and make payments

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TECHNOLOGY RELATED OPPORTUNITIES

Improve data management, access to information and data sharing across the organization

Improve access to mobile data by frontline field staff

Employ technology to automate manual processes, eliminate paper and improve service delivery

Continue to prioritize system and data security

Expand the use of tools for data analytics and visualization

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SERVICE MODERNIZATION PROJECTS

PROJECT STATUS

- The Town's services modernization journey is a multi-year iterative process.

- Starting in 2018, the Town has managed numerous service-focused modernization initiatives.

- COVID-19 social isolation protocols and remote staff requirements increased demand for near-term results.

- Further implementation of modernization initiatives requires augmented resourcing and specialized skills.

- Project performance will be enhanced with a continued focus on project management skill development and coaching.

Project Status

Total Inputs: ~ 300

30%

35%

45%

■ Complete ■ In Progress ■ Future

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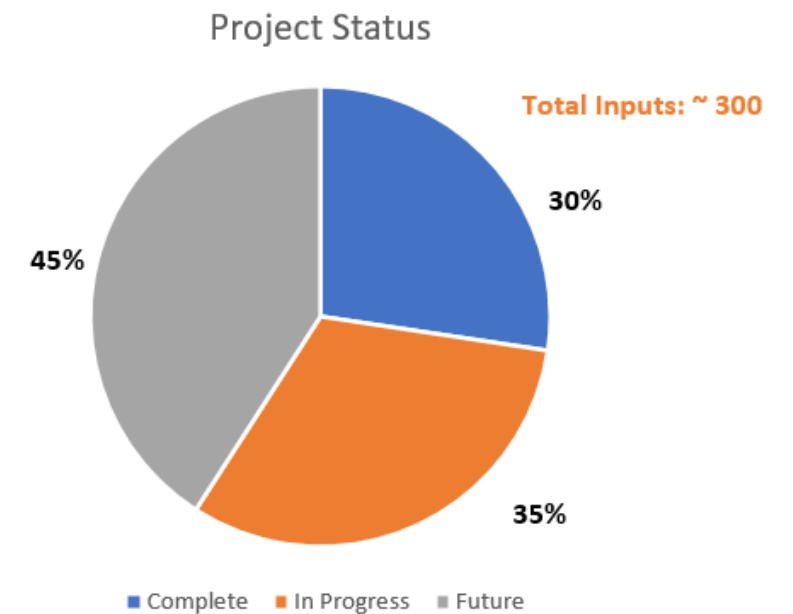
SUMMARY OF FINDINGS

More than 250 service modernization inputs were received during the service inventory activities with Town staff. For the purpose of this report we the key service improvement opportunities have been organized into three segments: Completed Projects, in-progress projects and future projects. To aid prioritization and planning activities the opportunities are presented with high-level data outlining the area of improvement, main benefit, time and cost estimates. The following supplementary service improvement data was collected and will aid future planning efforts:

Service description	Description of the service
Service Owner	Primary service owner/provider
Department / branch	Primary department /branch
Service classification	Legislative Requirement, Customer Service - Internal, Customer Service - External
Service improve idea	Tactics to improve service
Improvement area(s)	People, process and Technology related
Service improvement priority	High, medium, low
Are there alternative service delivery models available?	Yes, No
Information focused service	Yes, No
Aligned with Strategic Values	Yes, No
Change status	In Progress, Complete, Future
Volume of service	Yearly volume (where applicable)
Cost to provide service	Incremental cost (where applicable)
Current priority Service	High, medium, low
Primary benefactors	Residents, Staff, Town, Other

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SUMMARY OF FINDINGS

Many of the input opportunities require an investment in people, improved processes and technology. The improvements in processes and services, will ultimately lead to improved services, and increased capacity that may delay the need to hire more staff to meet future service volumes.

In many cases, the opportunities our recommendations will allow the Town to meet its legislative obligations, improve service levels or enhance efficiency. Not all opportunities will produce immediate savings or results. This situation is reflected as the Town is investing in foundational elements that will provide opportunities to further modernize services. An example is the implementation of Microsoft's 365 suite, a cloud–based solution, that comprises a number of business solution tools, besides email services, that are designed to provide opportunities for the Town to modify how services are delivered without the need to always hire software developers.

Given that the Town is poised to expand the local economy and attract new residents and businesses in the near term, the opportunities identified in this report should be seen as required investments that are not only foundational but will enable the Town to maintain its brand as a highly efficient, low-cost provider of innovative and resident focused services.

The following pages outline the service improvement ideas tabled by the BSAT, opportunities that have been completed, opportunities in-progress and opportunities that may be actioned in the future.

RECOMMENDED BUSINESS SOLUTIONS ADVISORY TEAM PRIORITIES

- The Town's BSAT refined the various service improvement initiatives in addition to those currently underway.

- The BSAT further refined the functional priorities into the following cross-functional list of corporate priorities.

Service Name	Description / Benefit
Service Request Management Tool (CRM)	Implement a Customer Relationship Management (CRM) solution that improves ability to manage, track and report on customer inquiries and work orders
E-commerce solution / Online payments	Implement a digital online store to support marketing of new products and services, including payment processing
Winter Operations Dashboard	Implement an operational dashboard that supports route planning, tracking and exception management
Building Access Control Solution	Implementing an access control solution that improves building ingress/egress to Town facilities would improve the protection of assets and staff safety
Paperless Office Strategy	Modify business processes to enable a reduction of paper across the organization
Wi-fi / High-Speed internet (Town facilities and Parks)	Improve availability of Town Wi-Fi services in key Town facilities and Parks.
Digitize Operational forms and records	Digitize the existing paper forms for operations staff to use mobile technologies to manage maintenance data in the field (Main Valve Operation/ Maintenance, Fire Hydrant Maintenance Program, etc.)
Fire Permit Automation	Provide an online application process that includes payments, activation and reporting
Business Advantage application process prioritization	Prioritize processing of economic development applications that are expected to result in job creation
Pet Licenses	Automate the issuance, payment process and management of pet licenses

MAJOR MODERNIZATION - COMPLETED (1 / 2)

Service Name	Service Description	Primary Improvement	Primary Benefit
COVID-19 virtual operations	Implement solutions to facilitate virtual / remote town services and meetings (laptops, software, training and solutions - secure access to data remotely, send/received secure files).	Access to Information	Improve Service
Financial System Upgrade (Vadim)	Upgrade Vadim to a cloud-based solution (complete) to facilitate a resident Self-Serve Portal, enhance reporting, pet license administration, resident access to W/WW bill access	Process Improvement	Improve Service
Budgeting solution (FMW) implementation	Automate the preparation and approvals of annual budget submissions & reporting	Process Improvement	Save Time
Corporate Data Visualization initiatives	Socialize key performance indictors in the form of a SMT Dashboard and Development Dashboard. Establishes a standard and toolset to provide future visualization accomplishments.	Access to Information	Improve Service
Parking ticket solution	Automate the issuing of parking tickets in the field while improving tracking and reporting.	Process Improvement	Save Money
Virtual Recreation Program Hub	A COVID-19 response. Setup an area where instructor could use a Town provided space/equipment to conduct programs (virtually), which was a substitute for in-person programming.	Process Improvement	Improve Service
Learning Management Solution (LMS)	Implement a solution to improve access to training content and reporting of certification status	Access to Information	Improve Service
Bids & Tenders procurement	Automate the publication, processing and evaluation of tenders across the organization	Software	Improve Service
Corporate email service migration	Migrate corporate email, shared mailboxes and folders to Microsoft M365 cloud-based services. Benefits include enhance data and user security as well as reliability and resiliency	Access to Information	Improve Service
Pet Licensing solution	Automate the approval, processing and tracking of pet licenses	Process Improvement	Improve Service
Digital Project Window	Realtime video tracking of site construction activities for residents and staff to view progress and milestones of various Town projects	Access to Information	Improve Service

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Service Name	Service Description	Primary Improvement	Primary Benefit
Windows 10 desktop upgrades	Upgrade windows 7 to windows 10 to meet security and performance requirements	Software	Improve Service
Network Security Enhancements	Implement an additional user login step to increase assurance of authorized use. Project included extending the length of network passwords, implementation of a 2-factor software tool and a cleanup of shared folder permissions.	Access to Information	Improve Service
Cyber Security Solution	Implement technology to mitigate email phishing. Scope included staff with awareness training and training content.	Software	Improve Service
Virtual Call Centre	Modify call centre phone system to allow staff to process calls virtually. Includes a Voicemail server upgrade.	Process Improvement	Improve Service
Council Livestreaming Enhancement	Livestreaming of open Council and Committee of the Whole. Enhancements include multiple screen input options and multiple camera angles and to provide adequate workspace for support staff during Council and Committee meetings.	Software	Improve Service
Esri / GIS Portal upgrade	Upgrade GIS Esri platform, implement York Regional GIS data processing standards, formation of a Town GIS working team, implementation of a GIS data service request process. Relaunch of the Town GIS portal.	Software	Improve Service
Smoke/CO Alarm solution (GIS)	Create a survey application and dashboard for use by Emergency Services to track smoke alarm survey statistics	Access to Information	Improve Service
Septic Inspection solution (GIS)	Create GIS layer showing septic locations and 2019 inspection status for internal PORTAL service and mapping	Access to Information	Improve Service
Tree Inventory App Update (GIS)	Tree inventory updated for best data collection; Updated App provided to staff; future updates to include locations from as-builts	Access to Information	Improve Service
Ward App (GIS)	Create an application to search by address to give Ward result and information	Access to Information	Improve Service
Broadband Service Data (GIS)	Create a GIS map showing current and future broadband services	Access to Information	Improve Service
Wi-Fi services for the Farmers market	Provide wi-fi services for the market vendors and patrons that permit the processing of credit card payments.	Hardware	Improve Service

MAJOR MODERNIZATION CHANGES IN PROGRESS

Service Name	Service Description	Primary Improvement	Primary Benefit	Time Estimate	Cost Estimate
Document / Records Management	Implement an enterprise content management / records management solution to improve the access, protection, availability and records retention of corporate documents	Software	Saving Time	> 1 year	> 100,000
Website Enhancement & Redesign (2)	Modernize the Town corporate and economic websites to improve the layout and update content to make it easier for residents and businesses to locate information and process service requests	Access to Information	Improve Service	< 1 year	100,000 – 250,000
InfoNow	Development of an information portal to centralize Roll # / address information with key operational data including, property owner, permit data, water and tax bill information.	Access to Information	Improve Service	< 1 year	50,000 – 100,000
CityView Solution Upgrade	Implement permit portal to improve submissions, enhance building and engineering workflows. Improved reporting and access to data.	Software	Improve Service	< 1 year	100,000 – 250,000
Electronic Signatures	Implement a solution to permit digital signatures	Saving Time	Improve Service	< 1 year	< 10, 000
Winter Operations Dashboard	Implement an operational dashboard that supports route planning, tracking and exception management.	Access to Information	Improve Service	< 1 year	< 10, 000
Fire Permits	Review application, process payment, record on excel file for fire and provide permit to customer	Process Improvement	Improve Service	< 1 year	10, 000 – 50,000
Visitor Booking Service (iLobby)	Implement a visitor booking solution to manage arrangement and coordination of meetings with Town staff during COVID-19 social distancing protocols	Process Improvement	Improve Service	< 1 year	10, 000 – 50,000

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MODERNIZATION OPPORTUNITIES FOR THE FUTURE (1 / 3)

Service Name	Service Description	Primary Improvement	Primary Benefit	Time Estimate	Cost Estimate
Service Request Automation	Implement a Customer Relationship Management (CRM) solution that improves ability to manage, track and report on customer inquiries and work orders	Saving Time	Improve Service	< 1 year	100,000 – 250,000
Data Integration – GIS Map Layers with Operational data	Integrate GIS data layer with key operational data and provide suitable dashboard views	Access to Information	Improve Service	< 6 months	< 10, 000
Paperless Office Initiative	Develop a plan to reduce the reliance on paper to perform Town related services	Saving Money	Improve Service	< 1 year	< 10,000
Staff Technology Training Plan	Develop a technology centric training program to provide staff with modern business tool skills	Saving Time	Improve Service	< 1 year	< 50,000
Wi-Fi Services - outdoor & public spaces	Enable the public to use Wi-Fi enabled devices while using Town outdoor spaces	Hardware	Improve Service	< 1 year	> 100,000
Wi-Fi Services - In-building / facilities	Enable the public to use Wi-Fi enabled devices while using Town facilities	Hardware	Improve Service	< 1 year	> 100,000
Online services/ Digital Library	Provide access to eBooks, audio, education databases, movie streaming, all through website	Access to Information	Improve Service	< 6 months	< 10, 000
Loaning Technology/ Access to technology	To provide services to users who require the assistance	Hardware	Improve Service	< 6 months	< 10, 000
Fire Service Inspection Requests	Fire prevention component required for approval of building permits and other types of construction	Process Improvement	Improve Service	< 6 months	< 10, 000
Fire Safety Plan Processing	Fire safety plans submitted for FP review and comment. Commercial , daycares, schools, care occupancies	Process Improvement	Improve Service	< 6 months	< 10, 000

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MODERNIZATION OPPORTUNITIES FOR THE FUTURE (2 / 3)

Service Name	Service Description	Primary Improvement	Primary Benefit	Time Estimate	Cost Estimate
Building Automation (HVAC) Systems	BAS is required at most facilities to automate controls	Hardware	Improve Service	> 6 months	100, 000 - 250,000
Secure cash deposits	Currently a manual, insecure process	Process Improvement	Improve Service	< 30 days	< 10, 000
Waivers for CPRC Drop-in Programs	Waivers are added to our registration forms. Currently for Drop-in programs we do not have waivers for them to fill out.	Access to Information	Improve Service	< 30 days	< 10, 000
Park Asset Maintenance Dashboard	Provide staff a visual tool to manage and schedule all maintenance activities	Access to Information	Improve Service	30-90 days	< 10, 000
Improve Payroll processing & reporting	Ensure staff are paid accurately on a timely basis	Access to Information	Improve Service	< 6 months	< 10, 000
Security & Letter of Credit - Enhance Process and Document Management	Letter of Credit - Acquisitions, reductions and releases and tracking	Process Improvement	Improve Service	< 6 months	< 10, 000
Development Charge (DC) Credit Agreements - Enhance Process and Document Management	Draft, execute and administer Development Charge Credit Agreements	Process Improvement	Improve Service	< 6 months	< 10, 000
DC Credit Tracking	Track and administer DC and CCC credits owing to developers	Process Improvement	Improve Service	< 6 months	< 10, 000
Enroll in WSIB Excellence Program through PSHSA.	Ongoing development of Health and Safety program/policies.	Access to Information	Improve Service	< 6 months	< 10, 000
Council Minutes Process Improvements	Building, publishing, follow up, council approval & distribution	Process Improvement	Improve Service	< 1 year	10,000 - 50, 000

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MODERNIZATION OPPORTUNITIES FOR THE FUTURE (3 / 3)

Service Name	Service Description	Primary Improvement	Primary Benefit	Time Estimate	Cost Estimate
Fire Hydrant Maintenance - Data Access Improvements	Routine maintenance activities of Fire Hydrants activities: Hydrant inspection/ repair; Secondary valve operation; Pressure/ flow test; Hydrant winterization; Asset replacement	Access to Information	Improve Service	30-90 days	< 10, 000
Facility Inspections Automation	Automate facility inspections planning, data collection and reporting	Process Improvement	Improve Service	< 6 months	< 10, 000
Development Project Delivery Software	Provide contract administration and delivery of new development projects which include parks, open spaces, trails, active transportation, streetscape	Software	Improve Service	30-90 days	10,000 - 50, 000
Computers for Public access	Provide access to public computers with Wi-Fi and printing, plus Chromebooks to use in branch	Access to Information	Improve Service	< 6 months	< 10, 000

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RECOMMENDATIONS

CHANGE READINESS TO SUPPORT SERVICE MODERNIZATION

GENERAL RECOMMENDATIONS

1. Prioritize People, Process and Technology opportunities listed in this report.

2. Build on the initial investments in modernization funded through provincial grants and building fees by incorporating direct investment and alignment of resources within the annual operating budget.

3. Provide funding to address identified short term specialized resource requirements (included in proposed 2021 capital budget - $200,000 from IT reserve).

4. Implement training programs and initiatives to support effective change management.

5. Utilize the inventory of potential service delivery improvement inputs to plan, schedule and budget for priority change initiatives.

6. Continue to use the BSAT committee to review, evaluate and recommend future service improvement opportunities.

7. Initiatives that involve change should consider potential challenge and resistance in planning the scope, budget and schedule required for successful implementation.

CHANGE READINESS RECOMMENDATIONS

- Expand employee training program to ensure the organization is poised for successful modernization and transformation

- Increase the use of cross functional project-based teams

- Implement training programs and initiatives to support effective change management

- Increase training programs to support effective use of technology

- Ensure staffing and resourcing levels responsive and reflective of service demands using the shamrock model

- Promote service delivery improvement within individual performance plans

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PROCESS RECOMMENDATIONS

- Standardize methods, documentation and communications in prioritizing and implementing processes, projects and initiatives

- Continue to define and track service performance metrics and KPI's

- Improve ability to manage, track and report on customer inquiries and work orders

- Increase availability of resident self-serve system features to obtain information, acquire services and make payments

- Increase access to, and awareness of, Town by-laws, policies and Standard Operating Procedures (SOP's)

TECHNOLOGY RECOMMENDATIONS

- Improve data management, availability and sharing across the organization

- Improve access to data by frontline field staff (mobile)

- Employ technology to automate manual processes, eliminate paper and improve service delivery

- Continue to prioritize system and data security

- Expand the use of tools for data analytics and visualization

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THANK YOU!