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Town of Collingwood Service Delivery Review Final Report February 24th, 2021



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Disclaimer

Deloitte is not providing any audit opinions, conclusions or recommendations at this time. This report is being provided for information purposes to facilitate the next steps taken by the Town.

Executive summary

The purpose of the Service Delivery Review (the "Review") was to provide a comprehensive assessment of the Town of Collingwood's (the "Town") operations, define the programs offered by the Town and their desired outcomes, and determine opportunities for the Town to deliver its services more efficiently. The results of the Review, completed by Deloitte ("We", "Us", or "Our"), were to be used to assist the community, staff and Council in making informed, sustainable and strategic choices on the services and service levels currently provided by each Department of the Town.

Current situation

We completed our Review using the nine elements of the Town's Strategic Vision¹ as guiding principles that the Town aims to achieve:

Collingwood's Strategic Vision

The following are the elements of the strategic vision:



¹ Source: Town of Collingwood Community Based Strategic Plan 2020 - 2023

The Town continues to be one of the fastest growing communities in Ontario. As of 2020, the Town's population was 24,952² and by 2031, the Town's population is projected to grow to 33,000, a 51% increase from 2016³. This growth will continue to impact the services provided to the residents and tourists and may well require the Town to change the way it organizes itself and operates. The changing demographics centered around an ageing and growing population will also affect the mix of services and the diversification of how the Town delivers those services.

In order for the Town to respond appropriately to the expected changes in citizen demand, Departments should work together to adopt a Town-wide view of the community programs and outcomes they each support and understand how the services that they provide should support the Town's programs. Currently, Departments tend to focus on day to day activities that fall within their purview. However, significant gains can be driven when a broader view is adopted. For example:

- Worktech was procured to support Public Works, Engineering and Environmental Services as a workorder software. It has since been identified that Worktech's capabilities could also support the delivery of services within Clerk Services. Sharing access to the Worktech system with Clerk Services will expand the reach of this resource. It is critical that a more central view be taken when making similar decisions to determine the most optimal solution for the Town overall.
- The Municipal Law Enforcement Officers work to ensure compliance with parking bylaws. In addition, Winter roads are plowed by Public Works staff. Both of these are examples of tasks under *Community Mobility* program. By defining the program and the desired outcomes, both services providers can work toward the greater goal by communicating, for example, when roads are blocked and can't be plowed due to a parking issue, or on the other hand, a parking officer can communicate with the snow removal team when they see a snow hazard that needs attention. This collaboration is already occurring but understanding and working toward a greater outcome reinforces this kind of behaviour.

A defined set of programs and program outcomes will help the Town make better decisions to ensure that the services it provides align to support these program outcomes.

Desired future state

In order to achieve the desired future state for the Town, we performed a number of activities, including the development of program and program outcomes for the Town. We also helped the Town identify a number of opportunities for changes to services to make them more efficient, effective and economical to deliver.

Programs and program outcomes

The Town identified the Ontario Public Service (OPS) Reference Model⁴ as the framework to help it define its programs and program outcomes. We applied key concepts of the OPS methodology, a top-down approach to define the Town's programs, outcomes and align the delivery of the Town's services to the programs. The key benefit of defining the programs and their outcomes, was to provide a framework that could be used clarify how each service actually should contribute to achieving the program outcomes. Below, is a summary of the programs and outcomes that were developed with the Town.

² Source: BMA Management Consulting Inc. Municipal Study 2020, Socio-Economic Indicators

³ Source: Town of Collingwood Community Based Strategic Plan 2015

⁴ Source: Government of Ontario, Government of Ontario IT Standard (GO-ITS), Number 56.1 Defining Programs and Services in the OPS. Queens Printer for Ontario, 2010

Progra	ms		Outcomes
	1.	Community Development	Support community development that protects and leverages Collingwood's core strengths (commercial/residential assets and people), and economic growth
Î	2.	Environmental Management, Conservation and Sustainability	Manage, mitigate and improve the environmental impacts to better serve the community today and for the future
A	3.	Community Safety	Ensure safety of people and property within the community
•	4.	Community Health and Wellbeing	Maintain and encourage better physical and mental well-being within the community
Ð	5.	Arts, Culture and Heritage	Recognize, and preserve the strength and diversity of arts, culture and built heritage within the community
Y	6.	Community Access and Mobility	Provide the integrated, safe and accessible movement of people and goods across multiple modes of transportation (e.g., active, transit, cars, etc.)
e	7.	Corporate Support Services	Provide effective and efficient cross functional efforts and collaboration to support the delivery of services
	8.	Municipal Governance, Leadership and Finance	Provide effective, responsible and accountable Municipal governance and administration

Applying this framework to how these services contribute to program outcomes is important. It will help the Town to:

- Improve decision making that would then drive service and financial benefits in all Departments, including process efficiencies and costs savings through the implementation of improvement opportunities.
- Help to engage the Town's Departments to working towards common goals and as they do so drive further cross functional and collaborative work in .
- Move the focus of decision making from a Departmental one to taking decisions based on program outcomes, which will help the Town to offer service outputs that better meet expectations by re-focusing its efforts to achieving its program outcomes.

Service opportunity themes from our review

In addition to the development of the framework, through our review we have identified **91** specific opportunities for the Town to consider in changing the delivery of its services. This outlook has been organized into four related themes:

Continuing the journey of digitization

A key component of the future state is implementing and providing the proper digital infrastructure to support the growth that is inevitable for the Town. Investments made to allow further digitization through technology and innovative solutions should be a top priority for the Town. Making these investments not only addresses a number of issues and pain points the Town currently faces in the immediate term but more importantly, establishes the foundation needed to address future growth. Improving service delivery through digitization will increase capacity and result in future cost savings within the Departments, which in turn can help relieve current resourcing gaps and assist in planning for the future.

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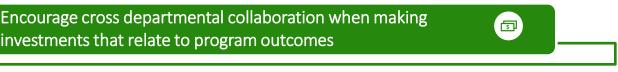
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Align processes to maximize the effectiveness of technology

As the Town continues to further their use of technology within their operations, the Town must also adapt to these changes by changing their processes related to service delivery. Digitization will enable the Town to improve their processes by reducing inefficiencies, duplication of efforts, promote cost-saving for the Town and address the challenges and pain points that various Departments currently face with regards to their existing manual processes. For example, utilizing the workorder software in other departments will help make them more efficient with their processes and ensure the technology is maximized for the Town. Removing manual, time-consuming processes will streamline various tasks, repurpose staff time to higher valued tasks and slow the need for future resources. This would not only increase the Town's day to day capacity but will also allow the Town to respond better and quicker to growing citizens demands.

Understand and document the level of service being provided by the Town today and in the future

As the Town continues to grow and operations evolve, the need to document the service levels today and in the future is important to ensure that the Town continues to operate in a way that achieves the Town's program outcomes. Departments can plan and organize their resources to support the achievement of meeting those service levels or understanding when levels may be dropping due to resource constraints. Having a conscious expectation of service levels or understanding when levels may be dropping due to resource constraints will allow Departments to better rationalize the time, effort and resources required to meet those service expectations, resulting in the sustainability of services and efficient use of limited resources.



Organization-wide information sharing, investment decisions and communication is a key success factor when modernizing the Town's services. For the Town to develop more efficient and effective processes to deliver services, Departments must engage in further cross departmental collaboration to ensure that all Departments are working towards common goals across the organization. Having an overall technology strategy will ensure that these investments are made for the benefit of Town departments. This will help to build capacity and savings across the Town in the form of time, effort and resources, which can be further realized through service digitization, process improvements and defining service levels.

Conclusion

The following are some key takeaways as a result of the Review:

.Î **Growth as a driver** – The Town has seen significant growth in its population as a community and this growth will continue to be a key driver of the various opportunities and challenges the Town will face including the demographics of an aging population. A key enabling component of growth is continuing to implement and provide digital infrastructure, which in turn will support improvements to processes and the use of Town resources. It is important for the Town to take action now to help to bridge current service issues but most importantly, support and manage growth in a sustainable manner for the future.

Importance of definition and framework – A well-defined program delivery framework will play a critical role in enabling the Town to shift from its Departmental lens to adopting a Town wide view. Programs with associated outcomes and mapped services will help to create alignment across Departments. Most importantly, in a growing environment, the Town must be able to clearly define and measure service levels and performance to ensure services are being delivered in a manner that contributes to the achievement of the Town's key strategic vision and program objectives. Program, program outcomes, services and service levels will evolve over time. As a result, the Town will need to understand and govern how changes are made to these elements in the future.

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Break down the silos – In a growing and evolving environment, collaboration is a key factor in a successful organization. The Town must embrace modern and collaborative processes to gain efficiencies through more connectivity within their operations. By implementing cross functional practices and shared uses will enable the Town to develop more effective processes through sharing of information, system integrations, cross functional training and improved decision making across the organization. This will help to break down existing silos within the Departments and will help to build capacity overall. Freeing up staff time through collaboration can be spent on higher value-added tasks for the Town. This would positively impact the quality of service being delivered to the Town and its citizens.

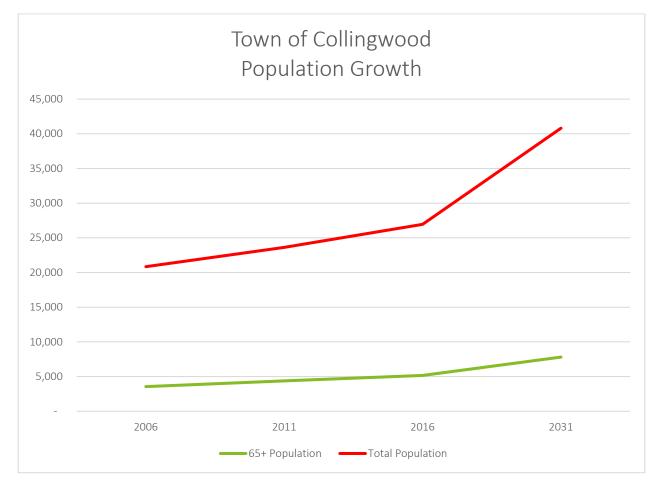
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Service changes – As Collingwood continues to grow, the Town will need to adapt and change the way that they operate to continue delivering services in an evolving environment. This will require the Town to consider service improvement opportunities related to the delivery of their services to ensure that the Town can continue to operate in an efficient, effective, and economical way that maximizes benefits for the community. In order to realize the value and benefits of these service improvements, the Town will need to prioritize and create a roadmap that outlines the opportunities to be implemented, reflecting the immediate short term and long-term goals of the Town. These goals should reflect the outcomes of the programs currently delivered and should be guided by the Town's strategic vision. Service levels and KPIs will also evolve and will also require future governance to ensure that each department continuously strives towards the achievement of the program outcomes and alignment to the community's vision.

Growth of the Town

Over the past decade, the Town has seen a steady increase in population. As of 2020, the Town's population was 24,952⁵ and by 2031, the Town's population is projected to grow to 33,000, a 51% increase from 2016⁶. Growth has also altered the demographics of the Town, increasing both the proportion of residents aged 20-44 and 65 or over⁷.

Figure 1.1



These trends will not only impact the Town, but the entire province. In Ontario, the number of seniors aged 65 and over is projected to grow from 2.5 million in 2019, to 4.5 million by 2046⁸. In Collingwood, seniors aged 65 and over currently account for 26% of the population⁹. The 65 to 69 age group has increased by approximately 49% from 980 to 1,595 over the period from 2006 to 2016 as shown in the chart below. The Town's population has shown considerable growth in residents over the age of 60 from 2006 to 2016, that has not been matched by the Town's younger age groups.

⁵ Source: BMA Management Consulting Inc. Municipal Study 2020, Socio-Economic Indicators

⁶ Source: Town of Collingwood Community Based Strategic Plan 2015

⁷ Source: Ontario Office of Economic Policy, Ontario Populations Projections Update, 2019-2046

⁸ Source: Ontario Office of Economic Policy, Ontario Populations Projections Update, 2019-2046

⁹ Source: Statistics Canada

Figure 1.2

Age	2006	2011	2016	Change (2006-2016)
•				
0 to 4 years	5%	5%	4%	-4.3%
5 to 9 years	5%	5%	5%	9.0%
10 to 14 years	6%	5%	5%	-20.8%
15 to 19 years	6%	6%	5%	-28.1%
20 to 24 years	6%	5%	5%	-11.7%
25 to 29 years	5%	5%	5%	15.9%
30 to 34 years	6%	5%	6%	-0.5%
35 to 39 years	6%	6%	5%	-8.6%
40 to 44 years	7%	5%	6%	-19.1%
45 to 49 years	8%	7%	6%	-29.7%
50 to 54 years	7%	8%	7%	-9.5%
55 to 59 years	7%	8%	8%	7.2%
60 to 64 years	6%	8%	8%	32.6%
65 to 69 years	6%	6%	8%	40.1%
70 to 74 years	5%	5%	6%	15.3%
75 to 79 years	4%	4%	5%	10.9%
80 to 84 years	3%	4%	3%	20.0%
85 years and over	3%	3%	4%	42.0%
Total	100%	100%	100%	

As a result of these growing demographic profiles, there will be an increase in the demand for public services for seniors, including, recreation programs, and related services. Currently, the Town is the economic centre of Simcoe County and an increasingly popular tourist and part-time residential destination due to its proximity to the Town of Blue Mountain and the Town of Wasaga Beach. It is estimated that in 20 years, Collingwood's recreation/seasonal population will grow 74% from its 2011 population of 5,440¹⁰.

It is clear that this growth, the maturity in the population and the popularity of the Town continues to drive changes to the services provided. When identifying programs, program outcomes and opportunities for changes to service delivery, these future trends must be considered.

¹⁰ Source: Town of Collingwood Official Plan of Collingwood 2019

Project approach summary

We were engaged by the Town to complete a Service Delivery Review. The purpose of the Review was to gain a better understanding of the programs, program outcomes and services provided by the Town and to assist the community, staff and Council in making informed, strategic choices regarding the services and service levels currently provided. Management acknowledges that in order to be in a better position to meet the immediate and long-term service delivery and fiscal sustainability needs of its residents, the Town needs to consider identifying opportunities to improve the efficiency of its service delivery.

Project objectives

The Review was guided by the following objectives as outlined in our Request for proposal (RFP) response:

- Ensure long-term financial sustainability and maximizing public value;
- Drive service level improvements that best meet the current and long-term needs of its residents;
- Recommend improvements to processes that drive service delivery efficiency and cost effectiveness; and
- Make better use and integration of existing and new technologies

Scope

The scope of the Review included all 8 Departments within the Town as follows:



The scope of work also included:

- Review of financial investments and customer service measures
- Market scan of other municipalities regarding their customer service measures and use of customer management information system (CMIS) tools
- Identify business requirements for a CMIS
- Identify alternative methods of service delivery (i.e. share resources with other municipalities, online delivery of resources)

Methodology, approach and timeline

Work began on October 9th, 2020. The draft report to the Ministry was completed on February 19th, 2021. The final report was provided to the Ministry on March 1st. The report was written in collaboration with key internal stakeholders. The Town provided a project manager as a main contact and formulated a project Steering Committee consisting of a group of Town executives that provided support, guidance and oversight towards the Review. We also worked with Department heads, managers and staff as needed. We would like to thank the Town for their support and hard work in helping us complete this review. The Review was completed in the following four work streams.

Work stream 1 – Project Launch and Data Gathering

A kick-off meeting was held on October 9th with the Steering Committee to confirm the detailed work plan, which included defining the roles and responsibilities of team members, project scope and timeline. In conjunction with the development of the Town stakeholder consultation plan, this work stream also included data gathering and analysis. A data request was also sent to the Town post kick-off meeting. The Town provided information on each Department, including the services provided and financial data that we used to develop our understanding of the services and their impact on the community.

Work stream 2 – Service Delivery Review

Program and outcome development:

A virtual workshop was held with the Steering Committee and representatives from each Department on January 21st, to define and develop program names and program outcome definitions for the Town. The OPS Reference Model¹¹ definitions of programs and program outcomes, were used as a guide for developing the Town's programs. The results of the workshop were eight programs and their related program outcomes defined, refined and tailored to the Town that were informed by the Town's strategy. These were endorsed and validated by the Steering Committee and the Town participants that attended the workshop.

Service listing:

In 2012, the Town had prepared a detailed inventory listing of all the services offered by the Town. The list was rationalized the list into larger, overall service categories and updated to reflect the Town's current services and operations. The result of this exercise was an aggregation of 73 services across the organization. Once this was validated by each respective Department, we mapped and aligned each service to the finalized programs and program outcome listing. We then designed an approach to establish and determine the associated costs to deliver each service. This approximate cost allocation provides a data driven approach to understanding what it costs the Town to provide a service which will assist with future decision-making regarding service levels made by the Town. All steps associated to the service listing exercise were validated by the Steering Committee.

¹¹ Source: Government of Ontario, *Government of Ontario IT Standard (GO-ITS), Number 56.1 Defining Programs and Services in the OPS.* Queens Printer for Ontario, 2010

Service opportunities:

Throughout this phase, we conducted interviews with key members from each Department to gain additional knowledge of services performed and the current and future challenges they face. This knowledge helped shape potential opportunities for service delivery changes for the Town. We compared current practices to our knowledge and expertise of service delivery practices while considering opportunities to drive efficiency and modernization. A listing of 91 opportunities were developed that included the opportunity name, a description of our findings, and a detailed description of the opportunity for change. In addition, we outlined the risk to the Town of not implementing the opportunity, the complexity of it, the high-level cost to implement (low, medium, high) the benefit, additional considerations and potential time frame to implement.

For further details regarding the complete service opportunities listing, please see Appendix A.

Customer service Key Performance Indicators (KPI) and measurement:

As part of the Review, we were asked to comment on the Town's development of customer service KPIs and to benchmark them against other comparable municipalities and our knowledge of leading practices in customer service KPIs. We developed a summary of these considerations to be used by the Town.

For further details regarding the customer service KPI and measurement, please see Appendix D.

Work stream 3 – Customer Management Information System business requirements (CMIS):

In this work stream, the Town was aware that there was an opportunity for service delivery improvement by investigating the business requirements for a CMIS to support a systems selection process to improve customer service management. Due to the confidential nature of these requirements, the outcomes of this work stream were provided directly to management and are not included in this report.

Work stream 4 – Preliminary report and final report

In the final phase of the project, we compiled this final report which summarizes the elements of the project and our findings from the Review. A draft report was circulated for commentary and feedback from the Steering Committee. This resulted in the final report to the Ministry.

Program and program outcome development

The Town identified the Ontario Public Service (OPS) Reference Model¹² as a framework to help it define its programs and program outcomes. We applied key concepts of the OPS methodology, a top-down to define the Town's programs, outcomes and align the delivery of the Town's services to the programs. The key benefit of defining the programs and their outcomes, was to provide a framework that could be used clarify how each service actually should contribute to achieving the program outcomes. This would also allow each department to have an impact and stake in the outcome.

We conducted a workshop to facilitate this exercise with the Town management. Working alongside the Department's Directors, and representative Managers, the objective of the workshop was to develop a framework for describing the programs and the program outcomes that are delivered across Departments by the Town. Prior to the session, we had shared with the Town a listing of common municipal programs, outcomes and examples of select services mapped to each program. Leveraging the OPS methodology and guided by the OPS Reference Model¹³, the workshop was broken down into the following activities and key steps to achieve the goal of understanding how the Departments work together on the programs and program outcomes of the Town.

Activity #1: Define the programs

The objective of this activity was to define a set of programs that would be applicable to the strategic objectives of the Town of Collingwood. Using the listing of typical programs for municipalities as a starting point for this activity, we drafted a list of programs for the Town's consideration and asked the Town to conduct the following steps and answer the associated questions:

- 1. Review the draft program listing does each Town Department agree or disagree with the list of programs?
- 2. Is there a need to rename any programs based on the experience of the Town of Collingwood?
- 3. Are there additions to this listing of programs from your Department that don't seem to fall within the list?

Activity #2: Define the program outcomes

Leveraging the results from activity #1, we asked the Town to define a set of program outcomes using the example outcomes provided as a starting point for this activity. This activity was facilitated through the following steps and required the Town to consider the following:

- 1. Review the draft outcome statements, does each Town Department agree or disagree with the statements?
- 2. Are any changes required to the statements?

¹² Source: Government of Ontario, *Government of Ontario IT Standard (GO-ITS), Number 56.1 Defining Programs and Services in the OPS*. Queens Printer for Ontario, 2010

¹³ Same as above

Due to Covid19 lockdown restrictions, the workshop was facilitated through the use of an interactive online workshop tool. The Town's participants were able to provide their input regarding adjustments required to the program names and outcome definitions. There was active participation and collaborative discussion among the group.

Consolidating all feedback from the workshop, we were able to finalize the program and program outcomes for the Town. As a result, the following chart reflects the summary of programs and outcomes tailored to the Town, validated by the Steering Committee and by those that attended the workshop.

Progra	ams		Outcomes
	1.	Community Development	Support community development that protects and leverages Collingwood's core strengths (commercial/residential assets and people), and economic growth
	2.	Environmental Management, Conservation and Sustainability	Manage, mitigate and improve the environmental impacts to better serve the community today and for the future
ľ	3.	Community Safety	Ensure safety of people and property within the community
•	4.	Community Health and Wellbeing	Maintain and encourage better physical and mental well-being within the community
Ø	5.	Arts, Culture and Heritage	Recognize and preserve the strength and diversity of arts, culture and built heritage within the community
Y	6.	Community Access and Mobility	Provide the integrated, safe and accessible movement of people and goods across multiple modes of transportation (e.g., active, transit, cars, etc.)
Ô	7.	Corporate Support Services	Provide effective and efficient cross functional efforts and collaboration to support the delivery of services
	8.	Municipal Governance, Leadership and Finance	Provide effective, responsible and accountable Municipal governance and administration

This finalized listing was used as the basis to map the service listing to their main respective programs. For details regarding the service mapping, please see the "Service Listing" section below.

Program and program outcomes will evolve over time. As a result, the Town will need to understand and govern how changes are made to the program and program outcomes in the future. The Town will also need to consider the individuals who need to be involved in making these changes to ensure that programs continue to be aligned to the vision and that program outcomes are achieved. This would also apply to other related elements such as services, service levels and KPIs that will also evolve and need to be governed as well.

The programs, outcomes and services were further documented in the form of program profiles for each respective program. Each profile includes a summary of the key details pertaining to each program such as: name, outcome, mapping of the services that support the program. For further details regarding the program profiles, please see **Appendix B for the eight program profiles**.

Service listing

Another key component to this Review was to list the services performed by the Town and understand how they align and contribute to programs and support the achievement of the programs' respective outcomes. Within the Review, the following key steps were taken with respect to the service listing:

- 1. Service listing rationalization
- 2. Alignment of services to main programs
- 3. Service costing

Service listing rationalization and alignment to main programs

During our Review, we obtained the Town's 2012 service inventory listing, and rationalized and updated the Town's services to reflect the Town's current operations. The result of this exercise was an aggregate of 73 services for the Town across all 8 Departments, validated by the Steering Committee and those that attended the workshop.

We understand that services provided can support a number of different programs and program outcomes. Within the OPS methodology, it is recognized that a single service can support multiple programs. However, at this time, services were only aligned to their most relevant program and associated outcome (please see Appendix B for details.) Please note that the intent of the program and services inventory listing is to be a living document that will be updated on a regular basis. Further work to align services to all the programs they support should be considered in the future.

In order to assist the Town in understanding how the services they provide can result in desired program outcomes. It also shows how services provided by different departments come together to provide a program outcome for the good of the Town.

For further details, please see Appendix C for the full listing of services mapped to each program.

As a result, the profiles show that there are many services provided across many Departments that contribute to a program and program outcomes. This is precisely why the Town undertook this exercise, to show how Departments work together to contribute to the programs.

Other items to note were:

- The Town provides a large amount of support across Departments, with 30 services mapped to the Corporate and Customer Support program across 5 different departments (Customer and Corporate Services, Parks, Recreation and Culture, Finance, Library and Fire Services). The back-office functions supports a number of Departments who in turn provide services that support Town Programs.
- Services under the Parks, Recreation and Culture Department aligned predominantly between 2 programs for the Town: Arts, Culture and Heritage and Community Health and Wellbeing that both achieve distinct outcomes.
- There are three programs mapped exclusively to the Public Works, Engineering and Environmental Services Department: Community Development, Community Mobility, Environmental Management, Conservation and Sustainability

• The Community Development program is one of the most dynamic programs within the Town that contains services across three different departments: Social housing, Planning and Development and Public Works, Engineering and Environmental Services

Service Costing

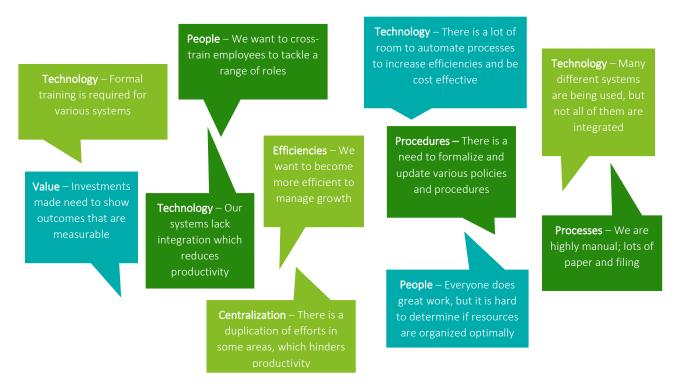
After understanding what services the Town provides and why, we designed an approach to understand approximately what the services cost to deliver. We obtained the 2019 audited consolidated financial information from the Town, that included their actual spend for the year ended December 31, 2019 and assigned these costs to the validated services. Due to the various overhead items, we utilized activity-based costing to provide a more accurate basis for the costs incurred by each of the services. As a result, we determined the amount of time spent by each of the FTEs within each service and allocated the overhead or any other shared direct cost by the proportion of time spent. The assignment of line items and allocation of costs was then validated by each of the Departments.

Service opportunities

Background

As part of our Review, we worked alongside the Town to analyze and develop recommendations to help the Town deliver their services more effectively. In order to gain a thorough understanding of the Town's services and operations, we conducted multiple interviews with each Department lead, their managers and staff to discuss issues and opportunities to change the services the Department provides. This included discussions around their current challenges, strengths and their goals for the services in the future. This helped shape potential opportunities for improvement, cost savings and other changes to service delivery for the Town.

As a result, we identified 91 opportunities for service delivery changes; recognizing the following common shared sentiments amongst the stakeholders:



We compared current practices to our knowledge and expertise of leading practices while considering opportunities to drive efficiency and modernization.

For further details around the service opportunities, please see Appendix A.

As Collingwood continues to be among the fastest growing communities in Ontario, this growth will continue to impact and change the way the organization operates in the future. The Town will continue to see an increase in volume of transactions with citizens as well as evolving demands on services and customer service.

As such, it is imperative to consider opportunities and ideas to better plan, support and strengthen the future outlook for service delivery with the Town. This outlook can be organized into four related themes:

- 1. Continuing the journey of digitization
- 2. Align processes to maximize the effectiveness of technology
- 3. Understand and document the level of service being provided by the Town today and in the future
- 4. Encourage cross departmental collaboration when making investments that relate to program outcomes

Continuing the journey of digitization

A key component of the future state is implementing and providing the proper infrastructure to support the growth that is inevitable for the Town. To enable this growth, investments made to allow digitization through technology and innovative solutions should be a top priority for the Town. Making these investments not only addresses a number of issues and pain points the Town currently faces in the immediate term but more importantly, establishes the foundation needed to address the future growth.

Many of the technology opportunities identified in this Review will address the challenges that various Departments currently face with regards to their existing manual processes. For example, implementing a CMIS software that helps to manage inquiries and requests would eliminate the manual nature associated to current time-consuming processes. Removing manual, time-consuming processes will improve tasks, reduce staff time and reduce future costs. This would not only increase the Town's day to day capacity but will also allow the Town to respond better and quicker to growing citizens demands. Adopting more digital tools, will enable the Town to an increased access to data which is critical in enabling the Town to make key strategic and financial decisions for the future.

Align processes to maximize the effectiveness of technology

As the Town continues to further their use of technology within their operations, the Town must also adapt to these changes by changing their processes related to service delivery. Digitization will enable the Town to improve their processes by reducing inefficiencies, duplication of efforts, promote cost-saving for the Town and address the challenges and pain-points that various Departments currently face with regards to their existing manual processes. Removing manual, time-consuming processes will streamline various tasks, repurpose staff time to higher valued tasks and slow the need for future resources. This would not only increase the Town's day to day capacity but will also allow the Town to respond better and quicker to growing citizens demands.

The Town uses a variety of technologies within their operations however, it has been identified that these technologies have not been used in the most effective manner by various Departments. Through the review, it was recognized that various Departments were using their own software systems that did not integrate with some of the other systems in use across the organization. It was also noted that some systems are not used to their fullest capabilities. For example, there is an opportunity for the Town to further leverage the Worktech software for all work orders to be housed in one centralized, digital system through the use of the GIS integration suite instead of using manual work orders. The Town can also utilize the iCompass software with respect to assigning items, tracking, and streamlining the overall Council agenda preparation and meeting processes. There are several digital opportunities identified in this Review that will help with further automation of processes.

Improving service delivery through digitization can increase the capacity of a Department and can result in future cost avoidance. By ensuring that the Town is using each of their existing software tools to their fullest potential, changing processes to become more digital, and sharing their software with related teams across the organization, the Town will be able to provide services more effectively and maximize their technology investments.

Understand and document the level of service being provided by the Town today and in the future

Within the review, we recognized that various Departments expressed a desire to gain a better understanding of service levels today and in the future as they relate to program outcomes. As the Town continues to grow and operations evolve, the need to understand and document service levels is extremely important to ensure that the Town is continually operating in a way that achieves the Town's goals while meeting the expectations of a growing population.

The Town has defined eight programs with related outcomes. These program outcomes are supported by the delivery of services. Understanding and documenting the level of services allows departments to plan and organize their resources to support the achievement of those program outcomes. Tracking changes over time to actual service delivery levels allows management to make informed decisions on the allocation of resources as they relate to program outcomes.

Encourage cross departmental collaboration when making investments that relate to program outcomes

Organization-wide information sharing, collaborative investment decisions and communication are key success factors when modernizing the Town's services. Having an overall technology strategy will ensure these investments are made for the benefit of all Town departments. This will help to build capacity and savings across the Town in the form of time, effort and resources that can be further realized through service digitization, process improvements and defining service levels.

For example, Worktech was procured to support Public Works, Engineering and Environmental Services as a workorder software. It has been identified that Worktech's capabilities could also support the delivery of services within Clerk Services. Sharing access to the Worktech system with Clerk Services will expand the reach of this resource. If the CMIS incorporates a point-of-sale system, there are many departments that would be able to utilize online payments.

This IT strategy and enterprise wide technology investment decisions will help the Town achieve the program outcomes identified in this Review.



Customer service KPIs and measurement

As part of workstream 2, the Town wanted to better understand what a good Key Performance Indicator (KPIs) is and what needs to be considered during the Town's KPI development for their customer service. The Town's KPI development to this point has been mostly focused on customer service and the KPIs developed to date have been largely measures of output. The Town aim to develop a more comprehensive set of KPIs that will allow them to achieve their goals and measure progress against these goals. These KPIs should measure and track performance and use comparative analysis to help the Town achieve its desired level of service.

The following section of this report outlines a variety of key concepts and leading practices to be used when developing KPIs for a public organization. The section provides:

- The importance of well-developed KPIs
- An overview of the Town's strategy,
- Performance Management Cycle,
- Characteristics of leading KPIs,
- Types of KPIs,
- Requirements for underlying data gathering,
- Data systems used,
- Jurisdictional scan of comparable municipalities, and
- Observations and recommendations

To date the Town has developed KPIs only in the context of customer service standards. The KPIs have been developed for each Department to assess if Departments are meeting their targeted level of customer service.

The importance of well-developed KPIs

The process of developing KPIs creates a shared perspective about the most

critical aspects of the entity and how it is performing. KPIs allow management to respond early to changes in service levels and address issues with corrective measures. By taking early corrective measures, the Town ensures the effective use of resources in achieving KPIs set as they relate to their goals and objectives.

When made public, certain KPIs allow governments to show what is being achieved through the use of public funds and whether those funds are being used wisely. Public performance reporting is a key communications instrument within a public sector entity for explaining how the entity is meeting its goals and objectives and contributing to the broader public purpose. Other internal KPIs can support the day to day management of the organization.





An overview of the Town's Strategic Vision

Leading practice performance management frameworks align KPIs that meets the Town's strategic vision. Going from the Town's vision to concrete actions within the Town's administration requires a supporting performance management framework with KPIs aligned to goals across the entire organization that the Town intends to deliver. The diagram below outlines the nine elements of the Town's strategic vision from Collingwood's *2020-2023 Community Based Strategic Plan* which should be considered in the development of the Customer Service KPIs for the Town.

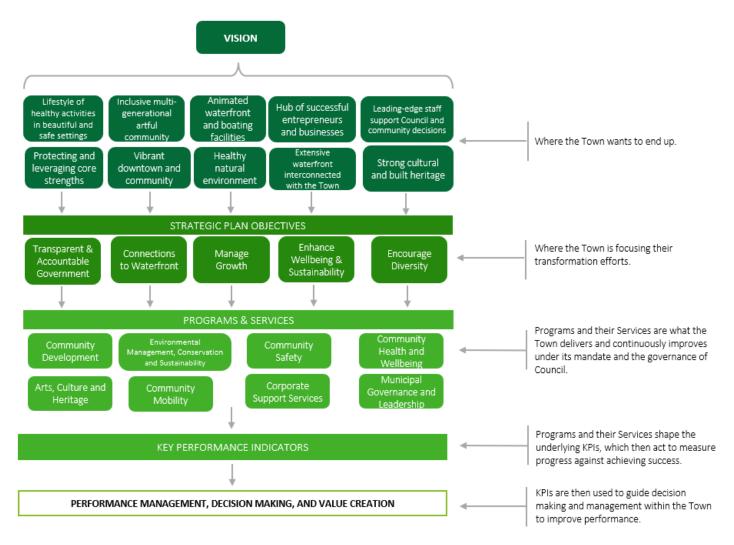
Collingwood's Strategic Vision

The following are the elements of the strategic vision:

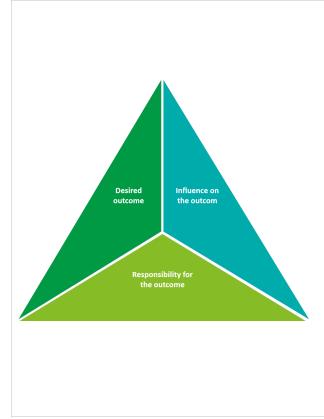


Performance Management Cycle

A strong performance management framework will help the Town achieve their vision and program outcomes, two elements that will drive the success and performance of the KPIs. To properly define KPIs, the Town should first define what success looks like. The flowchart below demonstrates how the Town's vision should be linked to programs and outcomes that will drive the KPIs. The programs and outcomes are areas where the Town must succeed to deliver on its vision and continue to meet its goals into the future.



It is important to have a performance management cycle which includes desired outcomes, the ability to influence these outcomes and notes who is responsible for these outcomes. Applying the Performance Management Cycle, the Town should consider the following when developing KPIs:



What is the desired outcome?

Collingwood has established its Community based strategic plan for 2020-2023, including an expansive list of items that reflect the nine key elements noted above in the Town's vision. As well, there are program and outcomes that have been defined that the Town's administration must consider in its work.

How can the outcomes be influenced?

KPIs must measure the performance of the entity or portion of the entity. With this in mind, the measurement must be something that the performer has control or influence over. For example, a Town can't control how many taxpayers they have, but they have some influence on the method of billing and processing tax payments, (within legislative constraints).

Who is responsible for the outcome?

Performance management typically utilizes a different set of KPIs at different levels of the organization, and for internal versus public communication. This ensures that the individual goals strived for by each member of the organization contributes towards achieving the overall outcomes. Management KPIs reflect the sets of goals at functional levels under their control.

Characteristics of leading KPIs

Defining useful KPIs requires consideration of multiple facets. Well-designed KPIs are:



Influenceable

A KPI should not be affected by events that cannot be controlled by its owner

2

Objective

Subjective KPIs can be influenced by perception of the rater and not controllable by the owner



Narrow in Scope

A KPI should address a single variable or a set of inseparable variables. Composite indices should be used with caution

4

Outcome-driven

A KPI should be reflective of the desired outcome and not merely provide a count



Consistent

Variables which fluctuate can obscure real changes in the KPI



Timely

Simple

KPIs must be measurable in a time frame that allows for changes to be addressed in real time, usually daily and sometimes weekly

Complex equations used to isolate individual variables leave people uncertain about how to address KPIs

7

8

Avoid undesirable outcomes Incentivizing improvement of a single KPI without consideration for others could cause broader harm



Minimal in Number

No more than 10, and preferably fewer KPIs should be created, at each level/area of the organization. They are after all Key indicators and too many can cloud the clarity of monitoring.

Types of KPIs

KPIs can be broadly split into four types, pertaining to their purpose or focus.

It is important to implement KPIs for each of the four types to ensure the Town gives users more valuable insights and a balance of information that covers all aspects of the organization. The Town has already begun development of customer service KPIs and have made their developments a priority going forward.

Customer	Financial
The KPI attempts to quantify or represent customer satisfaction (alternatively, citizen quality of life). Strong customer KPIs are linked to improvement plan.	The KPI strives to quantify the drivers that most directly affect finances or financial planning needs. Strong financial KPIs help determine and forecast unit costs.
Example: % Requests w/ Satisfactory Resolution in <5 Days	Example: Average hourly cost of an FTE
Service	Strategic
Service The KPI quantifies efficiency or effectiveness of a service. Strong service KPIs are linked to an improvement plan. Example: Average Request Resolution Time	Strategic The KPI measures progress towards a goal, vision, objective, or plan. Strong strategic KPIs are associated with the strategic plan.

It can often be difficult to identify what makes a good KPI and what is not considered a KPI. Below are examples of the leading characteristics of KPIs with comparisons to strong and poor KPIs.

Characteristic	Strong KPI	Poor KPI/Not a KPI	Reason
Influenceable	Average time to request resolution	Number of requests received	A manager of a customer service centre cannot control how many requests are made but can seek to resolve requests on a timely basis
Objective	Time to resolution: 3 days	Time to resolution: Acceptable	Those who can influence a KPI may interpret subjective results such as acceptable, differently from what is intended. The data around a KPI should be repeatable. i.e. others would come to the same conclusion around its measurement
Narrow in scope	Avg. Time to find a parking stall	Parking score = (Time to find stall * Stall utilization)/Stall turns per day	Compound metrics have too many variables and can often be adjusted by prioritizing one value driver over the others
Outcome-driven	Avg. Time to address customer inquiry	Number of customer service Staff per shift	The customer service Department should strive to address customer service inquiries in a timely manner. The number of staffs per shift has nothing to do with performing the service.
Consistent	Visitors per park per day	Unique visitors to the Town's public parks per month	The number of unique visitors is not consistently measurable nor of interest when attempting to determine how well utilized a public park may be.
Timely	Road defect identification to repair time (weekly average)	Road defect identification to repair time (annual average)	Annual calculation of metrics will not show variations in performance that can be acted upon in a timely manner
Simple	90% of service requests resolved within15 Days	Service request resolution stability = (longest resolution – shortest resolution)/avg. resolution	Complex equations leave the user unclear about how their actions may improve the KPI and how that is linked to everyday outcomes.
Avoid undesirable outcomes	Time to successful resolution	Time to resolution	If success isn't incorporated in the KPI or in an equally important KPI, people may be incentivized to prematurely resolve requests.

The following chart provides examples of how some of the Town's customer service KPIs currently in use relate to the characteristics of strong KPIs that were outlined above. Please note that we are aware that there are still standards in progress

Characteristic	Collingwood KPI	Collingwood KPI rating and reason:
Influenceable	Commissioner of Oath Service (Clerk services): Percent of walk-in customer requests that are handled real-time (staff available during business hours).	Strong, as this performance measure assesses what proportion of requests have met a specified target (handled in person) An additional KPI may include successfully resolved.
Objective	Customer Satisfaction (Library services): achieve 90% "satisfied" or "very satisfied" responses on iPad or paper surveys	Strong, as this performance measure sets a clear goal for its performance objective and measures if that objective has been met. A caution would be the number of customer willing to respond to a survey – there could be a bias to unsatisfied customers
Narrow in Scope	Human Resources: Percent of workplace incidents investigated and acted upon	This KPI could be improved upon as this performance measure has a wide scope and does not specify a specific target.
Outcome- driven	Finance 2020 goals: Launch virtual City Hall software for online access	This KPI could be improved upon as this is a goal that is not performance driven. A timeline as to the launch date or a metric showing the amount of online "hit" rates would be a better measure of the performance
Consistent	Borrowing services (Library services): Increase YoY: items borrowed by 3%	Fair, this performance measure shows the increase in use of borrowing YOY so it is consistent but there are many factors contributing to this metric that are not known and may or may not be controllable. (Foot traffic, changes to demographics, type of content, program offered, etc.)
Timely	Building Services (Planning, Building, By- Law): 100% of the requested inspections completed within the Building Code's legislated 2 business days.	Strong, this performance measure identifies a key objective and a timeline for completion.
Simple	Public Works Services (Public Works, Engineering & Environmental Services): Respond to 90% of inquiries within 24 hours.	Strong, this performance measure sets clear and concise targets. It can be strengthened by adding an additional KPI measuring successful resolution of inquiries by a certain time frame
Avoid undesirable outcomes	Human Resources (Customer & Corporate services): Percent of workplace incidents investigated and acted upon	Fair, this performance measure provides data on how many incidents were investigated and acted upon but does not illustrate how many incidents were successfully resolved or what changes were made to avoid future incidents (i.e. what is the definition of acted upon).

Requirements for Underlying Data Gathering

High quality data is crucial in ensuring the creation of reliable KPIs. Low quality data can distort KPIs, create unfair biases, or facilitate poor decision making. Available and timely data is a key requirement in the creation of strong KPIs.

Data Characteristic	Explanation
Reliable	Data can be replicated by independent observers to produce similar results.
Valid	The data is representative of the event/action it represents.
Relevant	Timely and available data is relevant. As data ages, it loses its relevance to the present state. Some data may be difficult to capture.
Fair	Data, especially subjective data, can be biased based on the observer, the recording/observation method, or the interpretation method. Bias may occur when information is chosen with particular interests, economic, or political objectives in mind. Omission of key information is a form of bias.
Comparable	Data can be used to assess measures against other data (past vs. present, Department to Department, benchmarks, etc.).
Consistent	Data is prepared on a consistent basis, or differences between information are clearly articulated.
Understandable	Narratives in plain, non-technical language about the data's origin, calculation, and measurement method can help a user understand its usefulness and limitations.

It is important to understand the data involved both in input and output activities when developing reliable KPIs.

Inputs are the financial and non-financial resources and authorities given to the entity to carry out activities, produce outputs and accomplish results. Inputs include items such as dates, numbers of transactions, tax dollars, user fees, transfers, human resources, capital and information.

Outputs are the direct products and services produced by the activities of the entity. An example of an output is the posting of road signs indicating dangerous zones.

Data systems used

Metrics that are required to develop KPIs may not be readily available in the systems the Town currently has. For example, time to complete a task may not be measured in standard enterprise systems. When designing a KPI you need to consider the input and output of data and how it will be captured and reported. This may require changes to existing systems or additional systems to be implemented to enable KPI development. Data systems should be used to allow for simple capture, storage and validation of data. The requirements of underlying data that are outlined above need to be captured by the system or the KPI may be invalid. A common example in Municipalities is having the customer service agents manually track service requests in a manual spreadsheet. This sounds like a good way to gain an understanding of the KPIs involved in request resolutions. This issue is that the person being measured is now also tracking the data, it is very time consuming to fill it out, it takes further time to go back to show the resolution is closed, the resolution solution may not be known if it was routed to a Department and there is no easy reporting of the information.

Jurisdictional scan of KPI implementation

We compiled a list of 20 comparable municipalities of similar size in Ontario. Each of the comparable municipalities have populations in the range of 20,000 to 30,000 residents. We then determined which of these municipalities publish KPIs.

Only 3 out of 20 comparable publicly publish KPIs. The municipalities who do publish are shown below. For a full listing of our jurisdictional scan, please see Appendix E for details.

Municipality	Population (2016)	Publicly Published KPIs	Where KPIs are publicly published
Orangeville	28,900	Yes	https://www.orangeville.ca/en/town- hall/resources/Documents/2015-Budget.pdf
East Gwillimbury	23,991	Yes	http://www.eastgwillimbury.ca/Assets/5+2015+Governm ent/0.4+Publications/0.3+Buisness+Plans+\$!26+Budgets/2 016+KPIs.pdf
Uxbridge	21,176	Yes	https://www.uxbridge.ca/en/living-here/resources/Final- Report_Uxbridge-Tourism-Plan-2020.pdf

This information and our knowledge of other entities was used in formulating our observations and recommendations.

Observations and recommendations

The following observations and recommendations have been formulated based on the above stated KPI leading practices and scans of other entities. We have created a short list of key observations and high-level recommendations to assist in Collingwood's continued KPI implementation.

Observations	Recommendations				
Several KPIs used by the Town track both targets and actual results. However, the Town does not describe the planned results and any inputs or assumptions used to arrive at these targets. The Town also does not explain significant variances when they occur.	The public performance report should describe the planned results for the reporting period and identify the source of the targets. Planned results would be stated in terms of outputs and outcomes. Reporting planned results and identifying the source of the targets provides a frame of reference against which to assess actual results. In addition to this, the report should describe actual results and compare them with planned results, explaining any significant variances. The explanation of variances would include both positive and negative aspects of performance, as well as major challenges identified for programs and services, in order to provide a complete picture of performance. It is important to understand that this is public communication, as a result transparency and privacy considerations must be balanced.				
The Town currently does not provide comparative information about trends or benchmarks and does not compare data collected to other comparable municipalities.	The Town should provide comparative information about trends, benchmarks, baseline data or the performance of other similar organizations where having these comparisons would be useful to users in interpreting and using the information provided. This analysis could be in the form of trend analysis where the actual results for the current period are compared against the actual results for prior periods. Including trend information allows users to assess plans, relate current achievements to long-term goals, and assess progress over time. Although this is a leading practice, the Town may find limitations in availability of comparable information. In the longer term, they could use prior years actual results as comparative information.				
The Town currently does not identify significant lessons learned during the	The Town should identify significant lessons learned during the reporting period and the implications arising from them. The public performance report would include a discussion of the potential future implications of				

Observations	Recommendations
reporting period and their respective implications.	significant variances that were identified. This would include an indication of how the lessons learned will be applied and identification of areas that may require further study or evaluation before any final decisions regarding changes to strategies or refining the performance measures can be made.
The Town tracks mainly inputs and outcomes, rather than actual performance measures. This may limit the users' ability to understand the Town's actual performance level and if the Town is meeting its objectives. This is because simply tracking metrics, such as how many customers visit a customer service representative is not indicative of Town performance.	The Town should pivot their KPIs to focus more on performance measures that illustrate what is actually being achieved with the resources consumed, in relation to what was planned. For example, instead of tracking how many customers visit a customer service representative, the Town should track and measure how fast inquiries are managed and to what level of customer satisfaction. Collecting baseline statistics on this kind of measurement will help the Town set goals and compare actual performance levels to these goals.
Currently, the Town has only established KPIs in the 'Customer' and 'Service' categories and does not use 'Financial' or 'Strategic' KPIs. This is an unbalanced approach and does not provide users with balanced performance information of the Town as a whole.	The Town should develop and implement KPIs in both the 'Financial' or 'Strategic' categories; this will provide valuable insights to users of the performance information. Financial KPIs will quantify the drivers that most directly affect finances or financial planning needs and will help determine and forecast unit costs. Strategic KPIs will measure progress towards a goal, vision, objective, or plan.

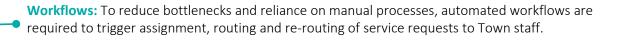
The Town has currently developed 33 customer service related KPIs. Through the use of the above leading practices and recommendations the Town can continue to develop new KPIs and improve existing KPIs that will enable it to help guide the actions and decision making across the organization, including systems to track the data. These newly developed and improved KPIs will align with organizational vision and will ensure continuous progress towards defined goals.

Customer Management Information System (CMIS) business requirements

The Town's focus on customer service excellence was a key priority and opportunity for service improvements during our Review. In order to streamline processes, increase efficiencies, and improve the overall customer service experience in the Town, we began the first phase in capturing the Town's CMIS business requirements that could ultimately lead to the procurement and implementation of the Town's CMIS.

During the requirements gathering phase, we conducted stakeholder interviews to understand the current challenges and developed business requirements to address those needs and current pain points. Working alongside representatives within the Town's Information Technology and Customer Service Departments, we facilitated a workshop to validate the identified business requirements, which were used to guide our market scan and research. During our market scan, we looked at comparable municipalities within Ontario that utilize CMIS tools to determine the leading best practices that could be applied and adopted by the Town.

As a result, the following were key takeaways from the exercise:



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Reporting: The Town's limited reporting capacity hinders their ability to utilize data in decision-making, therefore, using a dynamic report or interactive dashboard will help management to gain visibility over trends, customer satisfaction, and KPIs to support decision-making.

Focus on customer services: A fully integrated online experience for customers to fill out forms, communicate through email or phone, receive answers to common questions using an FAQ, and answer survey questions is required to reduce inefficiencies and enhance the overall customer service experience.



Enhanced internal communication: Internal communication between Town staff can be enhanced through a system that has the ability to tag and communicate with other divisions to collaborate on service requests and configure alerts to support time management.



Case management: To better manage the increasing level of service requests, a system is required to organize and track service requests by configurable business rules, view the status of work order completion, and edit work orders in the process.

Due to the confidentiality of the business requirement information, the full outcomes of this opportunity stream were provided directly to management.

Conclusion

Over the past four months, we conducted a thorough Review of the Town's service delivery as outlined above. Through this detailed work we have gained a detailed understanding of the eight Departments of the Town. This work resulted defining eight newly programs and related outcomes mapped to 73 aggregated services as well as 91 opportunities to change how services are being delivered by the Town. Our work regarding the customer service KPIs and CMIS involved deeper reviews of opportunities that the Town will take action upon.

The following are some key takeaways as a result of the Review:



Growth as a driver – The Town has seen significant growth in its population as a community and this growth will continue to be a key driver of the various opportunities and challenges the Town will face including the demographics of an aging population. A key enabling component of growth is continuing to implement and provide digital infrastructure, which in turn will support improvements to processes and the use of Town resources. It is important for the Town to take action now to help to bridge current service issues but most importantly, support and manage growth in a sustainable manner for the future.



Importance of definition and framework – A well-defined program delivery framework will play a critical role in enabling the Town to shift from its Departmental lens to adopting a Town wide view. Programs with associated outcomes and mapped services will help to create alignment across Departments. Most importantly, in a growing environment, the Town must be able to clearly define and measure service levels and performance to ensure services are being delivered in a manner that contributes to the achievement of the Town's key strategic vision and program objectives. Program, program outcomes and services will evolve over time. As a result, the Town will need to understand and govern how changes are made to these elements in the future. The Town will also need to consider the individuals who need to be involved in making these changes to ensure that programs continue to be aligned to the vision and that program outcomes are achieved through the delivery of services.

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Break down the silos – In a growing and evolving environment, collaboration is a key factor in a successful organization. The Town must embrace modern and collaborative processes to gain efficiencies through more connectivity within their operations. By implementing cross functional practices and shared uses will enable the Town to develop more effective processes through sharing of information, system integrations, cross functional training and improved decision making across the organization. This will help to break down existing silos within the Departments and will help to build capacity overall. Freeing up staff time through collaboration can be spent on higher value-added tasks for the Town. This would positively impact the quality of service being delivered to the Town and its citizens.

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Service changes – As Collingwood continues to grow, the Town will need to adapt and change the way that they operate to continue delivering services in an evolving environment. This will require the Town to consider service improvement opportunities related to the delivery of their services to ensure that the Town can continue to operate in an efficient, effective, and economical way that maximizes benefits for the community. In order to realize the value and benefits of these service improvements, the Town will need to prioritize and create a roadmap that outlines the opportunities to be implemented, reflecting the immediate short term and long-term goals of the Town. These goals should reflect the outcomes of the programs currently delivered and should be guided by the Town's strategic vision. Service levels and KPIs will also

evolve and will also require future governance to ensure that each department continuously strives towards the achievement of the program outcomes and alignment to the community's vision.

Continuing on the journey for digitization, embracing collaboration in more structured environment while understanding the value in implementing service improvements will help the Town to embrace future growth and changing demand for services.

Appendix A – Opportunities for improvements listing

Overview				Opportunity Assessment				Opportunity Quantification			Other Considerations	
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
1	Fire Prevention	Protective Services	Fire	Revise the Town's overall public outreach approach and program regarding fire prevention and education to address the needs of the Town's demographics	In recent years, the Fire department has increased its reliance on online platforms such as social media outlets and technology as a means to communicate and educate the public on fire safety and prevention methods. Due to COVID, technology has become a very important medium regarding fire education as presentations can no longer be conducted in person. Unfortunately, the Fire department has struggled to effectively reach and engage with Collingwood's most vulnerable population which consists of individuals over the age of 60 years old who are not as comfortable with technology. It is important to bridge this gap as the	There is an opportunity for the Town to revise their overall public outreach approach and program regarding fire prevention and education to meet the needs of all demographics within the Town. The Town could review their current approach towards their most vulnerable population and identify the best method to engage and communicate with demographics which struggle with digital or electronic communications. For example, in the interim, the Town could identify the residents who do not regularly use technology and target them for paper pamphlets, mail in information packages or direct phone calls to educate them on the value of technology and how to use these digital platforms. In addition, the Town		Moderate	Medium	Service level impact	Some residents may be very difficult to reach, and older citizens may still be resistant to change	Short term

Overview				Opportunity Assessment						Opportunity Quantification		
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					department believes that a higher level of education on fire safety and prevention methods can result in a reduced number of calls and deaths reported and as well, raise the awareness of how citizens can protect themselves and their families through fire prevention measures.	could investigate and implement other direct engagement measures. For example, the Town could target multifamily condominium complexes, hosting online presentations and education sessions to residents/owners. This would result in a more tailored approach that would assist the Town to effectively communicate with all demographics in the Town while continuously moving towards the department's strategic goal of utilizing more technology.						
2	Fire Prevention	Protective Services	Fire	Develop a more comprehensive set of key performance indicators across different platforms and strategies used by Fire services to evaluate their community engagement and outreach efforts	Fire services currently uses a limited number of metrics to evaluate and measure the success of their outreach program, as such, the Town is not capturing all data available to fully understand the efficacy of their communications programs.	"There is an opportunity for the Town to develop a more comprehensive set of key performance metrics and indicators across different mediums and strategies used by Fire services to evaluate their community engagement and outreach efforts. For example, beyond measuring the success of a message on Twitter by only the number of retweets or likes, the Town should also consider other social media metrics such as the	Low	Low	Low	Service level impact	Some communications programs, such as radio ads, may be more difficult to measure than others	Short term

Overview				Opportunity Assessment					Opportunity Quantification			Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
						number of views and shares. This will provide the Town with a more accurate representation and better understanding regarding the level of engagement their outreach efforts have had. The Town should also be using data driven analytics to measure the success of an outreach program. For example, tracking data such as number of visits on the Town's website pages that contains posted information and communications would help the Town understand the traffic level on their online platforms and better gage the efficacy of their communication efforts.						
3	Fire Prevention	Protective Services	Fire	Review current outreach efforts and processes to identify the users groups with low engagement, to target for improvement	Fire services has conducted various surveys out in the community and has received a positive response rate for their effort. However, the division would like to increase user engagement and see an increase in survey responses.	There is an opportunity to review current outreach efforts and processes to identify the users groups with low engagement to target for improvement. This review would allow the Town to gain a deeper understanding in relation to the effectiveness of their current efforts and would enable the department to revise their approach accordingly	Low	Low	Low	Service level impact	Response rates may still be low	Short term

	0	verview		Opportunity Assessment					Opport	Other Considerations		
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
						through the identification and development of a defined strategy. For example, the Town should ensure that in returning surveys, respondents are asked to self-identify into cohort groups so that the Department can determine if the appropriate demographic is responding. Additionally, the Department can develop an Active Engagement Plan & Approach to intentionally put on duty fire fighters into community settings, while still adhering to social distancing protocols, with the express intention of raising profile, awareness, and increasing impact with community engagement. This exercise would include a focus on improving the engagement levels towards specific user groups or demographics with current low engagement. This would improve the efficiency within the process and improve the service level provided as the defined strategy would target these areas in a more effective manner.						

	Section				Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service		Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
4			Fire	Develop and gain access to a business registry of all businesses in Collingwood to create stronger partnerships with private businesses to leverage and grow their public outreach programs.	Fire services currently does not have access to a registry of businesses that operate in Collingwood. According to the Chief, this hinders Fire services' ability to utilize these businesses as a medium to expand their outreach and limits their capacity to educate the public and the Town on fire prevention and other related matters.	Town to develop a business registry that includes all businesses that operate in Collingwood. Providing Fire Service access to this registry would allow the department to expand their outreach to the public. For example, businesses	Low	Moderate	Low	Service level impact	Not all business may be willing to participate in certain programs	Medium term
5	Fire Prevention	Protective Services	Fire	Create an online customer service platform where residents can apply for fire related permits online rather than in person at the Fire Hall.	Fire services currently requires residents to come in person to the fire hall to obtain permits, such as backyard fire permits. This is a very cumbersome process as it requires both permanent and transient residents to come in person.	There is an opportunity for the Town to develop an online portal or platform to allow residents to apply for permits without visiting the Fire Hall. This would result in further accessibility, flexibility and convenience for the public (permanent and temporary residents) to obtain permits. Using a web-based service would	Medium	Moderate	Medium	Service level impact, efficiency gain and cost reduction	Either Town staff or a third party would be required to maintain and run the platform which can be challenging due to current resource	Medium term

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						automate part of the application and approval process which would streamline the process to be faster and easier for both the public and Town staff. This would also result in time savings for staff. Rather than processing the permit in person, this would allow staff to provide more high value and customer service-related services. This process would also be safer and adhere to new social distancing protocols surrounding Covid. This should be considered in conjunction with the CRM implementation opportunity (opportunity #91) as this opportunity would integrate all of the Town's services into a centralized online platform.					constraints. Furthermore, some citizens might be resistant to change and do not want to utilize the online service.	
6	Suppressio n	Protective Services	Fire	Seek to expand mutual aid, agreements and partnerships with neighboring municipalities to share the growing demand for Fire	Fire services is considering building a new 'substation' (fire station) in the future to meet future population and infrastructure growth in the eastern part of the Town, however, they are limited in financial and staffing resources and require further resources	aid, agreements and partnerships with neighboring counties and other possible emergency services to meet the growing demand for Fire services in the growing east-		High	High	Service level impact and cost reduction	Other municipalities may be unable or unwilling to form partnerships	Medium term

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				services with overlapping regions	in order to complete and support this development.	could result in significant cost avoidance for the Town associated with building and staffing the new Fire Hall. This would also result in an increased level in service provided as a partnership with other municipalities in the east-end could help to cover staffing gaps and would improve response time to calls overall.						
7	Fire Prevention	Protective Services	Fire	Fire services should shift to a compliance audit structure supported by a policy which requires businesses to maintain an electronic database or ledger which contains updated information on when fire safety checks or updates have been made to their locations.	Fire services has been making in person visits to businesses to conduct regular checks and to confirm compliance against the Fire code. As such, Fire services has noted that they could further digitalize their operations by allowing businesses to keep an electronic record of their fire safety updates made throughout the year.	There is an opportunity for Fire services move to a compliance audit structure where business self-report compliance checks and the Fire services staff perform risk-based audits of these compliance records. First, Fire services should educate businesses on how to conduct regular fire safety checks and then log these safety checks in a ledger for Fire services to audit and check for compliance. This will allow for greater efficiencies to be gained by targeting risk- based safety checks. Rather than depending on Fire services' staff to conduct visits to enforce fire	Low	Low	Low	Efficiency gain	Businesses may not comply with policy.	Short term

	unity ID Service Division & Sut Section Section Section				Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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						prevention activities, businesses will confirm compliance digitally through the ledger and have fire staff visit at a point during the year to confirm compliance. This data driven approach could be developed to conduct fire safety inspections based on risk and rate of previous non-compliance. By redirecting those resources towards higher risk properties, the Town may be able to reduce the overall fire risk in the community.						
8	Fire Prevention	Protective Services	Fire	Use a data driven approach to identify times where the Full Time, on duty firefighters (who are Certified Fire Educators) can schedule neighborhood outreach efforts.	Fire services noted that they had experienced fatalities as a result of non-working smoke alarms.	There is an opportunity to identify times where the Full Time, on duty firefighters (who are Certified Fire Educators) can schedule neighborhood outreach efforts through online mediums and phone calls to actively inform, educate, and support residents in ensuring that they have working smoke detectors in their homes. The increased efforts would improve the level of service provided to the Town and would allow the Fire department to		Low	Low	Service level impact	N/A	Short term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	ication	Other Considerations
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						provide their services in a more effective manner.						
9	Financial Budgeting and planning	Corporate Management	Finance	Implement a budgeting software within the Finance department.	The Finance department often finds it very difficult to prepare annual budgets using their current budget process. The budget is currently prepared through word and excel and is therefore an extremely time- consuming process. Due to the manual workarounds, the finance department has had to rely on frequent back and forth between other departments and conduct manual revisions of the budget. Furthermore, The finance department faces challenges receiving input and data from other departments regarding their individual budgets in a timely manner.		Medium	Moderate	Medium	Efficiency gain	There may be a substantial learning curve for some employees during implementation of the software	Medium term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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						individuals. During the implementation process, the Finance department should provide training to its users regarding the use of the software and implement monitoring of the budgeting process. Furthermore, a budgeting software would also improve the integration of The planning and budgeting process with the financial reporting and analysis process when reviewing budget versus actual results.						
10	Grant Accounting	Corporate Management	Finance	Implement a grant management software in The finance department.	The Town's current grant process is time consuming and cumbersome. Grants can be initiated at the individual department level with little to no collaboration with other departments or The finance department. This lack of communication often leaves The finance department caught off guard and unable to react to incoming grant needs and requests. The finance department often lacks the ability to track and manage grants throughout this process.	handle various types of grants across the organization. This would allow The Finance department to track and manage	Medium	Moderate	Medium	Efficiency gain, service level impact	Learning curve with new technology therefore, staff are less willing to change their current process	Medium term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					A portal is available to help manage and track grants, however it is only of grants at the provincial level and doesn't capture unique or odd grants. The volume of grants received by Finance from the departments is often very volatile throughout the year which can lead to staff suddenly being inundated with the grant process requests.	approval and ensure the right departments are held accountable throughout the process. It is important that a reporting structure be developed and used with the implementation of the software. This reporting structure would result in the departments taking ownership of the initial preparation of the first draft of the grant report which would then be reviewed and managed by Finance. The use of automation through the software would improve data integrity and streamline the process to help to manage the volume and activities associated with grants.						
11	Financial reporting	Corporate Management	Finance	Develop and implement quarter- end closing procedures, with a goal of completing each month.	The Finance department currently does not have a month-end or quarter-end process. The absence of these procedures makes completing year-end procedures much more difficult and time consuming, taking several weeks if not months to complete.	There is an opportunity for the Finance department to develop and implement closing procedures starting with each quarter, with a goal of completing each month. Implementing close procedures will allow for year-end closing procedures to be streamlined and more efficient and lead to an ease of	Low	Low	Low	Efficiency gain	N/A	Short term

	cunity ID Service Division & Su Section Section				Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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						reconciliation upon updating final account balances. This will improve the reporting process by having more accurate data each month/quarter and will improve The Finance team's ability to perform year-end procedures to report in a timely manner. The Town should consider the use of software tools such as reconciliation automation to assist with the time it takes to close the books. Although this may require additional resources, the benefits of improved data and reporting will outweigh the cost associated to this opportunity.						
12	Accounts Payable	Corporate Management	Finance	Automate the accounts payable process.	The accounts payables (AP) process used by The Finance department is extremely manual and time consuming for staff. It is recognized that automating this process has been investigated and found too expensive. The tools for AP automation continue to become more economical and this investigation should continue. Both The finance	There is an opportunity for the Town to continue exploring the automation of its payables process through the use of a software system or other technology related solutions. Over time, the cost associated to technology will decrease and become more affordable to the Town. Automating the payable process will create efficiencies and decrease the Finance team's	Medium	Moderate	Medium	Efficiency gain	There may be a substantial learning curve for some employees during implementation of the software	Medium term

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					department and the Procurement team have reviewed potential options for automating the payables process and have been struggling to find an affordable option to help, however this should continue. In addition to the process being very time consuming, the manual nature of the process often yields errors since the Accounts Payable clerk often cannot rely on the departments to correctly approve payments.	day to day workload; it may also free up staff time to manage and resolve other issues outside of routine day-to-day data entry responsibilities. AP automation refers to technology that is used to remove manual tasks and provide better visibility and control over this financial data. For example, the Town could potentially explore the use of electronic invoices as a cost- effective solution that would help to streamline the AP process. Consideration should be given to continuing this search as technology becomes less expensive to ensure the right fit for the organization.						
13	Financial reporting	Corporate Management	Finance	Create a cross training mandate to ensure employees can be trained on a range of roles, starting first in the finance department.	The Town does not have formalized cross training procedures in place across the organization and only train staff when it is clear there will be turnover (e.g. retirement). Staff in the finance department are not trained on any	There is an opportunity to create a cross training mandate or requirement where various staff members within each respective department across the organization are trained on a range of roles. This mandate will be piloted in The Finance	High	Moderate	Low	Efficiency gain	This may be a time-consuming exercise and requires staff to dedicate time to the task. Furthermore, there may not	Short term

	unity ID Service Division & Su Section Section				Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					additional tasks beyond their core roles which leaves staff unable to support each other if there is volatility in their workload or if staff members are away. Finance is currently operating in a reactive manner. have always worked overtime to complete their day to day activities. This has hindered their ability to work on value- add activities, address new projects and make improvements.	department and could be implemented across other departments within the organization in the future. This will ensure that there is support among employees if there is volatility in workloads or employee turnover within the department and that critical roles can be covered by other employees. This mandate will be documented in a master document containing a detailed process and guide each role to ensure critical responsibilities can be covered by multiple staff members.					be enough capacity to conduct cross- training.	
14	Taxation services	Corporate Management	Finance	Automating the Taxation function through the use of a municipal property tax billing software.	The Town utilizes Great Plains for Taxation however, the tax billing and payments portion is a manual process. It is completed in house by the Tax Collector who prints out and mails physical copies of the bills. This has been time consuming and cumbersome for the finance department.	There is an opportunity to engage in a system selection process to explore the use of a municipal property tax billing software. This would involve putting together the business and technical requirements needed for the system and performing a system selection working with the IT division to understand if the systems currently used by the Town would serve such needs. If	Medium	Moderate	Medium	Efficiency gain, service level impact	There may be a substantial learning curve for some employees during implementation of the software and resistance to change	Medium term

	С	Verview		I	Орро	rtunity Assessment			Oppor	tunity Quanti	fication	Other Considerations
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						these tools do not meet the requirements, the Town should consider sourcing a system externally. Automating the taxation process will create efficiencies by reducing the manual efforts, increase the accuracy in tax reporting and decrease the strain on the Finance team.						
15	Finding and	opportunity are co	onfidential and for i	nternal use only.								
16	Accounts Payable/ Tangible Capital Assets	Corporate Management	Finance	Formalize the policy and procedures around the accounting for tangible capital assets during year end reporting.	The reporting process of capitalizing assets is extremely time consuming for The Finance department. This has caused the department to not be able to report their year- end on time. Currently, the review of invoices regarding the capitalization is taking place at year end. Due to the volume of capital projects, and the manual nature of the review, this has become a time-consuming exercise and has caused further delays	There is an opportunity to create and formalize the policy and procedures around year-end reporting of tangible capital assets This includes the creation of a formal policy with specific roles and responsibilities for all departments for the year end reporting process. This policy will also specify and communicate what inputs departments must provide to The Finance department, details around specific year end procedures, cut off dates for invoices and collection of expenses, accrual	Medium	Low	Low	Efficiency gain	Departments may be reluctant to commit to providing additional support to The finance department.	Short term

	unity ID Service Division & Su Section Section				Орро	rtunity Assessment			Opport	unity Quantii	ication	Other Considerations
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					within the financial reporting process.	policy information regarding dollar thresholds for accrual entries and as well clear reporting deadlines for all departments to follow and provide information to Finance. This will enable to Finance department to complete their reporting process in a timely manner while avoided unnecessary delays.						
17	Accounts Payable	Corporate Management	Finance	Creating a formalized process guideline to follow when coding invoices.	The Finance department has indicated that other departments will often code items to various accounts that may be incorrect. This leads to a time-consuming process causing duplication of efforts as The Finance department must be extremely diligent in their review and make the necessary corrections themselves on behalf of the departments. This has also led to inaccurate reporting and decisions made based on incorrect data. For example, the water department incorrectly places items in capital accounts, however, The	There is an opportunity for the Town to formalize policies and procedures to provide guidelines for staff to follow when coding invoices. This policy would include guidance to code invoices properly during the budgeting processes which would benefit and streamline the remainder of the financial reporting process. This would allow for an easier process for departments to follow and improve accuracy in their financial reporting. This opportunity could also eliminate the duplication of efforts as The finance department would not have to make substantial corrections if departments follow	High	Medium	Low	Cost reduction	Resistance from other departments in following the revised coding process	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quantii	fication	Other Considerations
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					finance team often does not have the time to correct this error.	the formalized guidelines, creating further efficiency for the department overall.						
18	Payroll	Corporate Management	Finance	Create a formal policy regarding time and attendance intake to be used for Payroll.	There is an inconsistent use of the time and attendance system, WorkTech across the Town. The Finance department has noted that there are various departments who have not adopted to using the payroll software. Alternatively, they will record their time manually using excel spreadsheets and will send their individual excel documents over to Finance to be inputted into the software system. This has created a very time-consuming process and yields errors and discrepancies as the timesheets are also often inputted incorrectly by staff within the system, requiring the finance team to investigate and manually reverse the errors.	There is an opportunity for the Town to create a formal policy and guidelines regarding time and attendance intake for all staff to follow. Ensuring that each department uses the payroll system will allow for efficiencies to be gained by the finance department as they will no longer have to manually transfer other department's payroll data from excel into the software. This policy should include mandatory use of the WorkTech software and details around the accuracy, frequency of the payroll entry and compliance with the use of the system can be tied to their overall performance. Consideration should also be given to understanding and addressing current perceived barriers to adoption. Furthermore, the guidelines will provide staff with clear instructions to follow when recording their time in the system		Low	Low	Efficiency gain	There may be a substantial learning curve for some employees during implementation of the software	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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						and will improve the accuracy of the data within the system.						
19	Financial Budgeting and planning	Corporate Management	Finance	Conduct an assessment and evaluation regarding which system between "CityView" and "Virtual City Hall" best fits the Town based on functional requirements, operations and business needs for online payment and other electronic services as a central hub for the entire Town.	There are currently two software systems in use within the Town that can process payments online, "CityView, " a property management system where building permits payments can now be made online through the "e-Permit Online Service" on the Town of Collingwood website via the CityView software and "Virtual City Hall," a payment portal software that offers a one stop shop to resident to view their tax amounts and initiate payments online. There are plans to roll out additional e- services on the Town of Collingwood website through the CityView software to be used as a central hub for all online payments moving forward. However, there has not been an analysis done, regarding which system could be used across the entire organization for each	This opportunity for the Town to conduct an assessment and evaluation regarding which system between "CityView" and "Virtual City Hall" best fits the Town based on functional requirements, operations and business needs. A process should also be developed to ensure that the necessary controls are in place to ensure amounts are accurately reported within the Great Plains software system. This would result in more efficient and effective operations, streamlining the overall process and improving service level output due to the digital use of the system which provides further accessibility of its services to the Town. Consideration should be given to the requirements of other departments that also require online payment services and other external tools as well. Furthermore, this opportunity should be explored in conjunction	Medium	Moderate	Medium	Efficiency gain, service level impact	N/A	Short term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	ication	Other Considerations
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					department's respective process.	with opportunity #91, where the implementation of a CRM would include the function of online payments.						
20	Administer and enforce the Ontario Building Code	Planning and Development	Building Services	Formalize the permit process within The building department for small scale items across the Town.	The building department currently has a turnaround time of up to ten days to process permits. Currently, there are no dedicated employees to the permit process and no standard permit applications for small scale items (i.e. deck permits) used across the organization. This has caused delays within their process and has hindered their ability to reduce the turnaround time for permits, with a goal of a one-day turnaround time.	There is an opportunity to formalize the permit process for small scale items across the Town. This would include creating and implementing the use of a standard permit application template and identifying specific staff to be responsible for the permit process. This will ensure consistent applications, which could increase efficiencies and streamline the process by making it easier for staff to review permits. In addition, this would also streamline the process by reducing turnaround times and improve overall quality and level of service provided to customers of the Town.	Low	Low	Low	Service level impact	It may be challenging to find staff to allocate to this task due to current resourcing constraints	Short term
21	By-Law Enforceme nt	Protective Services	Protective Inspection and Control	The building department should create a standard compliance letter template to be	The building department currently sees a duplication of services where three different departments issue their own customized compliance letters.	There is an opportunity for the Town create a standard compliance letter template to be distributed and issued among the departments internally. This	Low	Low	Low	Efficiency gain	It may be challenging for three departments to all agree on the	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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				distributed and issued among the departments internally.	This has caused inefficiencies within their process as there are different versions of the same letter in circulation, causing confusion as the compliance letters are said to overlap in the services that they provide.	exercise would include a collaborative effort among the three departments to ensure the letter is inclusive of the elements that would satisfy the needs of each department. This would reduce the duplication of efforts of the team and would improve the service provided as a consistent level of service can be achieved through the use of one standard template by the department across the three services.					elements of the standard compliance letter template.	
22	By-Law Enforceme nt	Protective Services	Protective Inspection and Control	Undertake a process review to achieve an outcome where one department (e.g. Planning & Development) is responsible for the coordination and accountability of the permit approval process.	The model that the Town uses for one inbound application that requires circulation and review, goes to multiple departments for review and results in multiple compliance letters being returned to the applicant. The independent review nature of the existing process not only creates confusion in overlapping responses but can negatively impact the customer experience, as there is not a specific department that is	There is an opportunity for the Town to undertake a process review to achieve an outcome where one department (e.g. Planning & Development) is responsible for the coordination and accountability of the permit approval process. This would improve the department's control over the circulation to other departments for their comments. To would ensure that the authority to agree with or override department comments and final approval rest with one	Low	Low	Low	Efficiency gain, service level impact	N/A	Short term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					coordinating and held accountable for the permit approval process.	singular department. This would result in an increased level of customer satisfaction by not only streamlining the process but provides one contact with final authority over their application rather than potentially three different adjudicators.						
23	Strategic planning	Planning and Development	Planning Services	Create a formal policy regarding electronic drawings for all departments to follow.	There are departments within the Town that still require paper drawings or hard copies for their large-scale plans. The paper based and manual nature of this process has caused inefficiencies as is impossible to have multiple staff or departments working on the documents at the same time. This has made the review and approval process difficult as it is more challenging to share, store and work collaboratively with paper drawings.	There is an opportunity for the Town to create a formal policy regarding electronic drawings for all departments to follow. This policy should include the mandatory use of electronic drawings to be developed and reviewed within the software system. This will help to streamline the process by reducing the dependence on manual efforts and coordination to facilitate the review. Using electronic plans and drawings will enable to town to work more collaboratively with the drawings in real time and allow for easier sharing and storing of documents.	Low	Low	Low	Efficiency gain and services level impact	There may be a substantial learning curve for some employees and resistance to change regarding the use of the software system	Short term

	0	verview)	Орро	rtunity Assessment			Opport	unity Quantii	îcation	Other Considerations
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24	Strategic planning	Planning and Development	Planning Services	Develop and implement of a Town wide people strategy to respond to and adequately support the community's continued development.	Housing trends within the Town indicate that the housing stock market over the next five to ten years will continue to get more complex with an increase in multi-story and multi residential buildings to be developed. The building department's current team complement lacks the necessary skill set to support complex development projects and as such, requires more expertise within their staff if they are to reduce the need for third party support into the future.	There is an opportunity for the Town to develop and implement a Town wide people strategy to respond to and adequately support the community's continued development. This strategy will include details regarding a training and skill development program for The building department to augment their skills set within their current team complement. By building and developing the skills of the team internally can help the department to better prepare themselves to meet the growing complexity of the Town's housing stock and will allow their team to properly execute and support these more complex development projects. This could reduce costs associated with engaging third- party support and would allow the Town to become more skilled and self-sufficient when it comes to work regarding complex projects, improving service level provided overall.		Medium	Medium	Service level impact	It may be challenging to find acquire funding to support this initiative	Long term

1	O	verview			Орро	rtunity Assessment			Opport	unity Quantii	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
25	Marketing and Business Developme nt	Planning and Development	Marketing and Business Development	Collaborate with the Customer and Corporate Services team to develop a promotional strategy to improve the marketing of Town to prospective business residents.	The full potential of collaboration between the Planning and development team and the Customer and Corporate Services team has not been realized. As such, the Town has not yet created a seamless handoff process for new/prospective business owners in terms of marketing Collingwood as a great place to invest, which could cause the Town to miss out on potential investment opportunities.	There is an opportunity for the Planning and Development division to collaborate with the Customer and Corporate Services team to develop a promotional strategy to improve the marketing of Town to prospective businesses. This should be evaluated for desirability and impact as part of a broader Customer Service and Economic Development strategy. The focus of this strategy is to increase the interest in the Town by expanding its reach and improve the number of consultations booked. This may help to further investments in the Town and draw more interest from potential residents.	Medium	Medium	Low	Service level impact	It may be challenging to have the Corporate and Customer Services team take on this initiative due to current resourcing and capacity constraints	Medium term
26	Finding and o	opportunity are co	nfidential and for i	nternal use only.								
27	Strategic planning	Planning and Development	Planning Services	Develop and implement a formal policy around maintenance of regulatory	The Town has not established a consistent process in regard to updating master plans and regulatory documents, which contributes to the risk that	There is an opportunity for the Town to develop and implement a formal policy around maintenance of regulatory documents and strategic plans. This policy will include guidelines	Low	Low	Low	Efficiency gain	It may be challenging designate a resource to this task as capacity is a current issue	Short term

	0	verview		i.	Орро	rtunity Assessment			Opport	unity Quantil	ication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
				documents and strategic plans	Town documents will become outdated.	regarding regular maintenance and updates to be conducted on a periodic basis. This is important to ensure that the department's operations are aligned with their strategic goals and reflect the current landscape of the Town. The policy should also contain metrics associated to their maintenance standards in order to accurately measure the progress and the effectiveness of the policy and their strategic plans. This would result in efficiencies gained reducing the volume of updates required as the maintenance would be conducted in a consistent manner.						
28	Strategic planning	Planning and Development	Planning Services	Provide formal training on the CityView software to The planning and development department and any other users of the software across the Town.	The planning and development team has identified that staff within the department do not have a strong understanding of the CityView software and have a low proficiency regarding the system. As such, this has impacted staff's ability to operate in an optimal and efficient manner.	There is an opportunity for the Town to provide formal training on the CityView software to The planning and development department and any other users of the software across the Town. This training should be provided on an annual basis and refresher courses on a periodic basis should also be provided to ensure that	Medium	Low	Low	Efficiency gain, service level impact	It may be challenging designate a resource to deliver the training on a regular basis as capacity is a current issue	Short term

	0	verview			Оррог	rtunity Assessment			Opport	unity Quantii	îcation	Other Considerations
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						the Town's understanding and skill set with respect to the software is up to date. This would result in efficiency gains when utilizing the system, improved service provided as the users will be able to leverage the software and enable the users to deliver their work more effectively.						
29	Strategic planning	Planning and Development	Planning Services	Assess to determine if the Town can delegate greater responsibilities to senior leadership.	Currently the majority of decisions and work regarding planning for the Town are done at the Council level, irrespective of the size and magnitude of the decision. This has resulted in decision making as a time-consuming process as small decisions such as, quick reworks are being approved by Council and will often take a longer time to gain approval. This may not be the best use of Council times and therefore, decision making authority should be revised.	There is an opportunity for the Town to compare the requirements and scope of the Municipal Act and Planning Act as it relates to types of decisions brought forward to Council. To streamline Council activities and management activities only decisions required by Municipal Act and Planning Act, as it relates to the Town's planning function, should be brought forward to Council. Other decisions could be delegated as the responsibility and authority of senior leadership of Town staff with regard to the Town's planning function. This would result in a more effective decision-making process and	Low	Low	Low	Efficiency gain, service level impact	N/A	Short term

	0	verview			Оррог	rtunity Assessment			Opport	unity Quantii	ication	Other Considerations
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						efficiencies gained through re- allocation of responsibilities.						
30	By-law planning services	Planning and Development	Building Services	Create a standardized permit application template and implement a policy that makes pre-consultation meetings mandatory when applying for a permit.	The planning department utilizes pre-consultation meetings with potential developers prior to the developer submitting an application for a permit. The pre-consultation meetings serve as a tool to better communicate and collaborate with the developer about aligning with Town goals and objectives, however, the pre- consultation process is largely informal. Furthermore, the pre-consultation meetings help to alleviate some applicants' confusion regarding this process.	There is an opportunity for the Town to standardize the permit application template and implement a policy that makes pre-consultation meetings mandatory when applying for a permit. These meetings can be held through online video conferencing or via phone call. Standardizing this process will ensure consistency and provide defined guidelines for all applicants to follow, reducing the confusion currently associated with the process. The mandatory pre-consultation meetings will enable the Town to control the quality of the application and will enable the Town and the developer to be more efficient by discussing any potential issues before submitting a formal application. This would reduce the likelihood of an unsuccessful application, appeals being submitted by the developers, and rework required on the	Low	Low	Low	Efficiency gain, revenue growth and service level impact	Not all developers may want to participate in a pre-consultation engagement.	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quantil	ication	Other Considerations
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						application. Mandatory pre- consultation meetings will increase revenue growth, and this enables the Town to build earn additional revenue with respect to consultation fees associated with the meeting. Furthermore, the increase in revenue would allow the Town to recover the cost associated in delivering the pre-consultation meetings through addition fees collected. This would result in efficiencies gained by streamlining the permit application process and will ensure greater communication and collaboration between the Town and the developers.						
31	By-law planning services	Planning and Development	Planning Services	Review and analyze The planning Department's fee structure currently used by the Town to gain a better understanding of the cost recovery level and the gap relative to other municipalities	The planning department's cost recovery is approximately 15% and is estimated to be extremely low relative to its comparators. The fees currently paid to the Town within the development process are approximately 20% lower than what they should to recover costs, in comparison to other municipalities.	level and identify opportunities	Medium	Low	Low	Revenue growth and efficiency gain	N/A	Short term

	O	verview		i.	Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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						Planning and Building reserve, to ensure that the department will be able to cope with future un- anticipated costs. This will also allow the Town to gain efficiencies as this exercise will enable the Town to plan accordingly to reach a target recovery level. If fees are increased, additional revenue and cost recovery for the Town could be generated.						
32	By-Law Enforceme nt	Protective Services	Protective Inspection and Control	Create and implement a more comprehensive parking strategy.	"The Town faces growing parking constraints from individuals driving up from the GTA to vacation or spend the day in the Town. The Town has found that there are often not enough paid parking lots and as such, they are unable to capitalize on potential revenue as tourists will park for free. In addition, residents within the Town cannot find parking along outdoor spaces such as parks or beaches due to the increase and volume of tourists. The Town currently provides the ability to pay for	There is an opportunity for the Town to create and implement a more comprehensive parking strategy. This strategy could include the development of additional paid parking lots throughout the Town to better support the growth in tourism and demand. The Town should also work to make paying for parking easier by utilizing the mobile parking application across all parking lots. This strategy could also consider the current fee structure for parking and review the use of variable parking fees (off peak vs peak times) to	Medium	Medium	Medium	Revenue growth and service level impact	Additional parking lots will increase the scope of the Parking Enforcement's patrol within the Town.	Medium term

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					parking through a mobile parking application however, this service is only available in selected parking lots. Furthermore, the Town has piloted a fixed fee parking structure.	enhance revenues. In addition, the Town could explore methods to view parking revenue as a source of income for strategic investments in its downtown core. For example, parking revenues could be used for debit financing for additional parking facilities or other amenity enhancements and attractions. The Town may wish to also consider creating resident only parking lots to ensure residents have a designated parking area while still accommodating the tourists of the Town by allowing them to park in another lot. This would result in greater service provided, increased satisfaction and enable the Town to earn additional parking revenue while maintaining better control over parking services within the Town.						
33	Human resource manageme nt services	Customer and Corporate Services	Human Resources	Automate recruitment process through online or technology solution to reduce	Currently, the Town's internal recruitment process is highly manual. When applications are submitted, they are reviewed and tracked manually through emails and verbal	There is an opportunity for the Town to decrease the manual activities associated with recruitment, by investigating an automated or online solution to reduce the administrative burden	Medium	Medium	Medium - High	Efficiency gain, service level impact	Up-front investments will be required in order to realize full benefits in the medium	Medium Term

	С)verview		l	Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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				administrative burden .	conversations between Human Resources and the associated hiring divisions. This process becomes cumbersome and decreases the overall efficiency of the application review process. The Town does not have a formal workflow that would allow for other divisions to generate requests from The human resources division with respect to items such as communicating hiring needs or onboarding new employees. Furthermore, when external users apply for job postings from the Town website, there is no standard template for applicants to input information. Additionally, roles and responsibilities have not been clearly defined between The human resources division and the hiring division, during the onboarding of new staff. As a result, The human resources division receives inconsistent information from its applicants, and it is often unclear which division	formalize the roles and responsibilities of the on-boarding process between the human resources division and the division that requires recruitment. The Town could explore implementing a Human Resources Management System (HRMS) or an online platform, with features suited for information sharing, data management, application submission, onboarding, as well as the tracking and reviewing of applications online. The solution should be evaluated for automation of scheduling and coordination of interviews within the system and providing access to all related departments across					term. New software also requires change management efforts.	

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	îcation	Other Considerations
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					(between Human Resources and the division that is hiring) is responsible for certain activities during recruitment which leads to inconsistent onboarding. Furthermore, the human resources division is unable to generate the insights and information that they require, as the reports are not tailored to their division's needs. All of the follow-ups, feedback, and document solicitation from applicants are done via email or phone.	the current Great Plains system. Features would also include an external-facing portal for prospective job candidates to submit their applications, as well as solicit feedback, and upload their onboarding documents. An HRMS or online solution, will result in a decrease to the duplication of activities and reliance on email and phone conversations between Human Resources, hiring division, and external candidates. By formalizing the roles and responsibilities of each division during the recruitment process, this will result in a more efficient process, by decreasing the uncertainty regarding ownership of tasks. This system would also allow the human resources division to easily retrieve, generate and track reports and insights in a timely manner. This system would include self-service capabilities, allowing employees and Town divisions to enter and view information populated themselves, improving the						

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	ication	Other Considerations
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						communication between the Town divisions and alleviating the administrative burden of the human Resource employees having to retrieve and relay the information manually. Furthermore, this will improve the timeliness of the overall recruitment process by decreasing the time spent tracking documents from prospective candidates and new employees via email. This will establish a more thorough and formal onboarding process for all departments.						
34	Labour relations	Customer and Corporate Services	Human Resources	Review and revise existing Human Resources policies to ensure that they reflect the Town's current standards, vision, and values regarding labour relations.	The human resources policies and procedures are outdated where some of the documentation is over twenty years old. These policies and procedures are likely to be out of date from the industry standards, legislative requirements and best practices. Furthermore, they no longer reflect the vision and values of the Town as the policies do not include	There is an opportunity for the Town to review their existing policies and revise them to include current industry standards, legislative requirements, and industry best practices. For example, concepts such as equity, diversity, and inclusion as well as any other elements that align with the organization's values. There is also an opportunity to ensure that these policies remain up to date,	Medium	Low	Low	Service level impact	N/A	Short Term

	С)verview			Орро	rtunity Assessment			Opport	unity Quantii	ication	Other Considerations
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					contemporary human resource concepts that exist and are important to be highlighted in organizations today. As a result, The human resources division is not comfortable with sharing these policies as they currently do not accurately reflect their Town's operations today.	by including guidelines requiring updates of these policies to be conducted on a 1-3-year basis. This will result in an increase to the service level output provided by the human resources division towards all Town employees.						
35	Labour relations	Customer and Corporate Services	Human Resources	Develop a formalized Work From Home (WFH) policy.	Throughout the COVID-19 pandemic, the Town was required to rapidly adopt a Work From Home (WFH) policy for the organization. However, due to the quick turnaround and the time constraints, The human resources division has not had time to fully and formally deliver the policy.	There is an opportunity for the Town to capitalize on operational cost savings, such as rent and utilities savings incurred due to flexible work arrangements by developing a formal WFH policy. This will result in increases to employees ratisfaction, by allowing employees requiring more flexibility to be able to work from home more often. The Town should consider that some employees are more productive and satisfied when working from home, as they are able to avoid commutes and increase the time spent on their tasks. This will result in an enhanced service level output by modernizing The	Low	Low	Low	Service level impact, cost reduction	N/A	Short Term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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						human resources services to provide employees with more flexible work arrangements.						
36	Labour relations	Customer and Corporate Services	Human Resources	Develop formalized succession planning procedures.	Currently, the Town lacks formal company-wide succession planning procedures. Internal successors have not been identified; therefore, each replacement must follow a very individualized and manual approach curated by the outgoing individual. The process is inefficient, as future skillsets and needs are not being proactively defined for roles. When seeking a replacement, the Town should identify if there is an internal candidate or a need for an external candidate to fit the needs of the role. Internal successors who have been trained for the position are unable to assume the position, and external hiring needs are not proactively evaluated, due to a deficiency in a	There is an opportunity for the Town to formalize succession planning procedures for various positions within the Town. After assessing talent, the Town should identify the current and future needs of the organization by completing an analysis of potential turnover and skills needed for various roles. The Town should also include a framework on how talent that has been identified as successors, can continue to learn and develop their skills in anticipation of assuming the role. Moving forward, these procedures should be updated and assessed annually to ensure the needs of the organization are being met. This will result in an improved service level output and efficiency gain, as those who have been identified as successors are ready to assume their position and a policy in place	High	Medium	Low	Service level impact, efficiency gain	N/A	Short Term

	C	Verview			Орро	rtunity Assessment			Opport	unity Quantii	îcation	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					standardized succession planning policy.	that will anticipate and manage that transition.						
37	Internal support services	Customer and Corporate Services	Fleet and Facilities	Revise the workorder data input and management process by having each department input their work orders directly within the system.	The workorder data input and management process is manual and inconsistent within the Fleet and Facilities department. The majority of the work orders are documented on paper and heavily relies on the individual to transfer the information into the Worktech system. As a result, this has caused data management issues within the Fleet and Facilities team as the work order data has not been inputted and is not up to date within the system. Furthermore, there are inconsistencies between the Fleet and Facilities departments with regards to their work order process. Only the Fleet department actively inputs and utilizes the work order system, no other departments on the Facilities side utilizes the software with the exception of the water	process. This would include further leveraging the Worktech system by having each department input their work orders directly within the system moving forward as a mandatory	Medium	Low	Low	Service level impact, efficiency gain	N/A	Short term

	0	verview			Оррог	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					treatment facility. This exposes the Town to potential risk such as missing legislative requirements and hinders their ability conduct sufficient analysis related to the work orders.	This would also result in improved accuracy of the data and can assist the team in planning by anticipating replacement needs, ensuring compliance, and improving efficiency within their processes. This opportunity should be considered in conjunction with the Fleet and Facilities division current facilities condition assessment that includes the potential to input data from work orders into WorkTech to better manage their assets.						
38	Facilities manageme nt	Customer and Corporate Services	Fleet and Facilities	Investigate a workflow system that will track and manage existing long-term projects for the Fleet and Facilities division, as well as integrate with the existing WorkTech system.	Currently, projects and work orders managed by the Fleet and Facilities division are tracked using a manual process (email, calling, or utilizing notebooks). In the case of a long-term project, the work is tracked using excel. This makes it difficult to manage all projects in development on a daily basis. There is a risk that the Fleet and Facilities division may overlook a legislative requirement, insurance	order requests and projects, and improve overall organization, by exploring a workflow system. This	Medium	Medium	Medium	Service level impact	Up-front investments will be required in order to realize full benefits in the medium term. New software also requires change management efforts.	Medium Term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	îcation	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					requirement, or the opportunity to be financially prudent by not having the time to perform a sufficient financial analysis while trying to track multiple projects.	the existing projects. Consideration should also be given to a system that would integrate with the existing WorkTech system to ensure that all requests and projects (short- term and long-term) within Fleet and Facilities are being managed in one consolidated system.						
39	Facilities manageme nt	Customer and Corporate Services	Fleet and Facilities	Revise the policy and procedures around data input for workorders within Worktech to clarify and educate staff members on the process.	Staff will create a workorder in Worktech for The finance department for invoicing purposes after the work has been complete. This process is incorrect as the workorder should be created before the work is complete. This has had a negative impact and has contributed to The finance department's issue regarding the timeliness of their invoicing process in relation to their AP close.	There is an opportunity to revise the policy and procedures around data input for workorders within Worktech to clarify and educate staff members on the correct process. Staff should create the work orders when the request is initiated and should complete all documentation in a timely manner once the job is complete. This would improve the timeliness of the process and would ensure that the invoice preparation process by Finance is not impacted. Furthermore, educating staff will help to streamline the interdepartmental processes.	High	Low	Low	Efficiency gain	Some employees may be resistant to change their current processes	Short term

	O	verview			Оррог	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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40	IT infrastructu re	All	All	Engage an in-house business analyst or consultant(s) on a as needed basis to review and evaluate the existing IT structure against the Town's business requirements and needs across all departments in order to determine the right systems for the organization.	Currently, there is a siloed approach to IT solutions and resistance to change with respect to new IT adopted by various divisions within the organization. As a result, IT needs are only being viewed through a divisional lens rather than from an organization- wide perspective. Often, each division will have their own relationship with specific vendors, and they will not take into consideration how their divisions' solution will integrate with other divisions that also rely on the same information or communicate often. However, there are situations where divisions are not utilizing their existing IT systems to their full extents or are resistant to integrating with other department's IT software, which could otherwise allow for improved process and communication between divisions. The Town has tried to discuss and develop a solution. However,	There is an opportunity for the Town to engage an in-house business analyst or consultant(s) on a as needed basis to review and evaluate the existing IT structure against the Town's business requirements and needs across all departments in order to determine the right systems for the organization. These individuals would work in conjunction with the IT Standing Committee to perform the review and evaluation. This will provide direction and insights regarding existing systems within the Town that could be further leveraged (i.e. WorkTech) and recommendations for other systems that could be considered to improve the integration across the organization. Consideration should be given to a system selection process to address addition system needs as a result of the review and evaluation. This will result in higher efficiency, by streamlining the process and developing an IT infrastructure that best serves and delivers the		High	Medium	Service level impact, efficiency gain	N/A	Medium - long term

	O	verview			Оррог	rtunity Assessment			Opport	unity Quantif	ication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					they have struggled with this process.	best possible service to the customers of the Town.						
41	IT infrastructu re	Customer and Corporate Services	Information Technology	Designate a Project Manager to manage the various IT initiatives and activities to be implemented as per their roadmap.	Five years ago, the IT department had developed a preliminary 3 to 5-year roadmap that contained key activities to be actioned. The department has completed these items within the timeframe, but due to the high volume of ad-hoc items that they are working on it can sometimes be difficult for the team to focus on other value- add activities. This has caused the IT team to sometimes play catch up with the rest of their yearly goals and plans.	There is an opportunity for the IT division to designate a Project Manager to manage the various IT initiatives and activities to be implemented as per their roadmap. An IT Standing Committee has been developed to provide governance but is currently in its early stages. Having a designated individual working alongside the existing IT Standing Committee provides additional support to the delivery and success of these key initiatives and activities. This would also allow for improved accountability and governance across the overall process, ensuring that the execution and completion of the activities within the roadmap are done in a timely manner.	Medium	Low	Low	Efficiency gain		Short term
42	IT infrastructu re	Customer and Corporate Services	Information Technology	Implement an IT managed service provider to supplement the	Currently, the IT division is struggling to manage the workload and demands of their division. While the IT division is	There is an opportunity for the IT division to implement the use of a managed IT service provider. By investigating the use of a	Medium	Medium	Medium	Cost reduction, efficiency gain	Standard and quality level of work may differ using a managed	Medium Term

	O	verview			Орро	rtunity Assessment			Opport	unity Quantii	ication	Other Considerations
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				division's daily tasks and free resources for senior staff focus on strategy and management.	able to manage daily activities such as: troubleshooting, desktop and phone support, managers within IT feel that they are unable to perform tasks outside of daily operations that require strategic management due to the volume of tasks. Additionally, the existing team in IT and GIS feel overwhelmed with the volume of daily requests. As a result, this has increased the pressure on staff and managers within the IT division feel that there is not enough time to work on value- add activities due to the current demands of the internal divisions that IT supports within the organization.	managed IT service provider, the internal IT division will be able to focus on value-add activities and the overall strategy of the Town's IT needs. This would result in a more cost effective solution relative to hiring additional resources and would alleviate the current pressures of the team, enabling them to manage the volume, demands and operations of IT in a more effective manner and as well, increasing the capacity of the Managers to be able to work on more value add activities.					IT service provider	
43		opportunity are cor		· · ·								
44	Finding and	opportunity are cor	nfidential and for in	nternal use only.								
45	IT infrastructu re	Customer and Corporate Services	Information Technology	Develop an IT governance framework to better	Currently, the organization does not have a formal analytical approach when determining how systems are	There is an opportunity for the IT Standing Committee to complete the Town's current IT governance framework and plan, using	Medium	High	Low	Service level impact	N/A	Short term

	O	verview		i.	Оррог	rtunity Assessment			Opport	unity Quantil	ication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
				support the goals of the Town.	developed. This impacts the services, as there are missed opportunities regarding digitization and as a result the organization remains heavily paper based. This is a corporate-wide issue, as it has been difficult to determine how the IT group can support this initiative.	leading practices, in order to address the challenges that the Town faces making decisions and implementing changes. The Committee should consider leveraging a or in-house analyst to assist with the development of the IT governance framework. The Committee should be able to identify the Town's goals with respect to how IT can better support their goal with respect to their ideal future state. This will result in enhanced service level output, due to a more robust and clear vision for IT governance within the Town.						
46	Communica tion services	Customer and Corporate Services	Customer Service	Create and consolidate a formal document outlining answers to frequently asked questions commonly posed by customers of the Town.	Representatives in the Customer Service division have found that there are between 12,000 to 13,000 inquiries from the Town last year and contain some commonalities within the inquiries. As a result, these can be summarized into a frequently asked questions reference. The Customer Service division has started this process, but it is a	There is an opportunity for the Customer Service division to create and consolidate a formal document outlining answers to frequently asked questions which are commonly posed by customers of the Town. This document should be updated periodically as the representatives knowledge base and the type of inquiries grows. This list should be documented online and posted to	Low	Low	Low	Service level impact, efficiency gain	There is a risk that documenting FAQs will increase the internal administrative burden for Customer Service staff. However, the benefits from	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					highly manual and cumbersome process as request are currently tracked in an excel spreadsheet.	the Town's website for all customers to access accordingly. This would result in an enhanced customer service experience through reduction of wait time for responses to frequent inquiries from members of the Town. This also creates efficiencies within the process as the Customer Service team will only need to deal with nonstandard inquiries.					annual maintenance will outweigh the administrative burden.	
47	Customer service	Customer and Corporate Services	Customer Service	Implement a 311 service to centralize all customer inquiries, requests and feedback.	"There is no centralized medium used to process customer calls and inquiries. Depending on their inquiry, customers need to call a different phone number for each department within the Town. In addition, there are other instances where customers will choose to inquire with the department, they are most familiar with rather than contacting the appropriate division. For example, many members of the Town will call the Parks, Recreation, and Culture (PRC) division's front desk for general	There is an opportunity for the Town to implement a 311 service to centralize all customer inquiry, requests and feedback across the organization. The 311 service would provide customers access to the Town through one single integrated communication channel that would manage all of the city's nonemergency service and information requests. This would create one centralized inquiry hotline number for the Town to streamline the customer inquiry process. The Town should also explore configuring an automated list on the help desk phone answering system, where						

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					inquiries because it is a Town number that they are most familiar with. As such, there is a duplication of efforts as PRC will field a lot of inquiries and the request would be passed on to various departments before reaching the proper individual for resolution.	members of the Town will be able to select the division, they wish to speak with based on a quick description of each division noted on the automated system. This automated element would allow the Town to better manage the volume of inquiries they receive, instead of answering the calls themselves. This will provide better direction to the customer to select an appropriate party that best suits their inquiry. As a result, this will increase the efficiency of the process and would enhance the customer service experience, by consolidating all help desk numbers into one specific point in contact. This should be considered in conjunction with the opportunity to implement a Customer Management System (opportunity #91) as software would include customer request management functionality as well. Ultimate decision will be based on the system that best meets the business's technical and financial requirements and needs.						

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48	Customer Service	Customer and Corporate Services	Customer Service	Develop an outreach program aimed at educating the public on technology- related changes to their public services to increase adoption.	The Town Hall is the most prominent location for members of the public to perform administrative tasks such as tax payments, obtaining dog tags, and bus passes. Many citizens like the physical aspect of completing administrative tasks, particularly those who are less confident using technology on a regular basis. In the past, to enhance services, the Town has increased the amount of FTE's to supplement the demand. Often, when new technologies are implemented to better support change, some customers are resistant to change.	There is an opportunity for the Town to develop an outreach program aimed at educating the public on technology-related changes to their public services, as a means of change management. The Town should focus on educating those who rely the most on these services and may struggle the most to adapt. This will result in a higher service level output, as the Town will ensure that all customers are increasing their technical literacy and utilizing new public services.	Medium	Medium	Medium	Service level impact	There is a risk that certain customers will be slow to adapt and continue to be resistant to chance.	Long
49	Customer Service	Customer and Corporate Services	Customer Service	Develop and implement a formal checklist regarding the level of knowledge that each Customer Service representative is required to know about the Town with	Currently, the amount of information and knowledge that Customer Service representatives must know about the other divisions and their operations when handling inquiries has not been defined. This has been a pain point within the Customer Service	There is an opportunity for the Town to develop and implement a formal checklist regarding the level of knowledge that each Customer Service representative is required to know about the Town with respect the other divisions, their operations and services. This checklist would	Medium	Low	Low	Efficiency gain, service level impact	N/A	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quantii	fication	Other Considerations
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				respect the other divisions, their operations and services.	division as representatives can spend additional time researching requests from customers and may still need to reach out to other divisions before an answer is provided.	allow the Customer Service division to better evaluate and define the scope of information required to handle inquiries from each division and would result in a consistent level of service provided across the Town. This evaluation would also help the team to better determine when it would be appropriate to pass along queries to other respective divisions. This will result in higher efficiency, as the Customer Services representatives will be able to better manage the volume of inquiries addressed by the team and would also improve the service level provided as queries would be directly to the appropriate party for resolution.						
50	Internal support services	Customer and Corporate Services	Customer Service	Implement an electronic workflow to support the mailing process within the Customer Service division.	During COVID-19, the Customer Service division has taken on the mail post responsibilities and are tasked with processing all incoming mail. To process mail, the Customer Service division will open all mail to determine if they can process, scan and	There is an opportunity for the Customer Service division to increase efficiencies in the mailing process by leveraging an electronic workflow system. This workflow would help to organize and keep track of the various transactional steps currently used within this process. For example,	Low	Medium	Medium	Efficiency gain	To ensure efficiencies, the Town should consider continuing to utilize this process post COVID.	Short term

	0	verview			Оррог	rtunity Assessment			Opport	unity Quantif	îcation	Other Considerations
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					email to the correct office or individual. Since all walk-in facilities and the front desk are closed, the Customer Service division must manage the additional volume.	instead of having to email the respective office or individual to notify them that their mail is in, the workflow would send an automated email to the appropriate party upon direction. This will help the Town to keep track of and organize the additional volume and manage the various steps in the mail process (ex. reminders to make extra trips to the post office as required, process planning department's mail immediately, etc.). To ensure efficiencies, the Town should consider continuing to utilize this process post COVID. This will result in increased efficiencies, as the Customer Services division will be able to supplement some of their physical processes with online solutions and as well reduce the amount of manual efforts.						
51	Community outreach	Library	Library Services	Review the Library Service's mandate to decide if the Library should be performing	Library services is often asked to perform activities outside of the scope of Library services that will take precedence and becomes a priority for the	There is an opportunity for the Town to assess the Library's current mandate and responsibilities to determine if the Library should be supporting	Low	Low	Low	Service level impact	N/A	Medium Term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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				additional social services to better support the Town.	Library department. For example, there is an absence of support for social services in many Libraries outside of larger cities which are currently becoming a center for those experiencing various social and economic challenges. As such, the Library arranged for a social worker to hold office a few hours a week prior to the pandemic. Given that the Library services is seen as a one stop shop and a key resource to the public, it has become challenging for the department to create boundaries around prioritizing tasks despite having a public service manual that provides guidance on activities that are immediate vs secondary.	services within the Town, this would provide further guidance to the Library team regarding the						
52	Information desk	Library	Library Services	Revise the Library staffing schedule to better serve members of the Town during peak times.	Typically, the Library reaches its busiest time late in the afternoon. The Library team finds that they are overwhelmed with various requests, such as bus pass purchases and book returns	There is an opportunity to revise the staffing schedule to better allocate and plan ahead for the increased service requirements. Ensuring that staff are available during peak times would result in a service level increase as the	Low	Low	Low	Service level impact	New staffing schedules will require acceptance from staff and flexibility from management, if	Short term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					from customers during these peak hours.	staff will be able to better manage the influx of patrons during peak times to improve staff support on the overall department.					they are to work outside of standard business hours.	
53	Information desk	Library	Library Services	Implement the business requirements for the Library Service's systems and explore a system selection process to streamline and integrate the different Library systems.	The Library division is using various software that do not integrate seamlessly with one another. Currently, the Library has two servers that they must utilize as the staff must input information to both the County and the Town servers. For example, if a member of the Town wants to buy a membership then the Library staff will need to input this information onto the County servers and then physically walk to the Town servers in order to accept the transaction to ensure that it goes onto the Town's general ledger. As a result, the Library staff finds this process to be highly time consuming.	There is an opportunity to implement a system selection to streamline the existing processes and integrate the disparate systems. As integration of Workflow (the County server) and Great Plaines (the Town server) is not possible, The Town should evaluate the systems against the Town's business requirements and needs to select a system that will be able to eliminate the need to use different servers in order to complete one transaction. As a result, the Library services will gain efficiency by reducing the manual back and forth currently required to complete the transaction and improve overall service provided.	Low	Medium	Medium	Service level impact, efficiency gain	Up-front investments will be required in order to realize full benefits in the medium term. New software also requires change management efforts.	Short term
54	Information desk	Library	Library Services	Revise and create a more robust training program to prepare	When a new Library staff member is hired, it can take up to a year for them to be fully	There is an opportunity for Library services to revise their training process by leveraging existing	Medium	Low	Low	Efficiency gain	A more formal training and succession	Short term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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				new staff for their role.	proficient in front desk services. This is due to the variety of inquiries and tasks that they may be faced with as it can take a year for new staff to feel confident answering questions.	information at their disposal and creating a more robust training program. For example, the division could utilize their public service manual in order to determine between regular vs ad- hoc activities. The Town could compile a log with standard responses for each activity and could be used as a reference guide for staff throughout their operations. Library services should also develop training milestones, for instance, determining key activities that new employees should be proficient within the first 30 to 90 days of employment. This will generate efficiency gains and a higher service level output, as staff training time will be reduced and they will be more equipped to provide quality service to the Town.					program may require existing staff to be temporarily occupied from existing responsibilities at certain times during the day during the training period.	
55	Technology access and assistance	Library	Library Services	Review and revise the existing service catalogue available to the patrons of the Library.	A large percentage of the Library patrons are senior citizens who are not confident using technology. As a result, Library staff are tasked with	There is an opportunity for the Town to review and revise the existing service catalogue available to the patrons of the Library. This review will provide	Low	Low	Medium	Service level impact	The older demographic might be resistant to change and level	Short term

	C	verview			Оррс	ortunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					teaching senior citizens with minimal tech skills how to perform their tasks on the Library computers.	insights to the Town regarding how their current services are performing, which services are being under-utilized and identify the need for new services within the Library division. For example, the Town could launch and run courses focused on enhancing technology use for citizens with minimal technology skills. The Town could focus on teaching this demographic how to perform commonly misunderstood tasks such as: password reset, sending emails, and printing documents as well as giving them practice and comfort over using the library technology. Aligned with COVID protocol, the courses could be recorded, so that they can easily be viewed online for future reference or provided in person at a later date. This will result in improve service provided as the Library staff will be tailoring their existing services to assist all members of the Town.					of interest for this initiative may be low.	

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56	Circulation and curation and library material	Library	Library Services	Develop an alternative funding model to support investments in Library Services.	Currently, the Library division has identified areas within their operations that require significant technology and financial investments to improve and modernize existing Library services, specifically, to create more online options for customers. However, Library services lacks the funding necessary for these investments. As a result, the Library has needed to develop creative funding plans, such as the Friends of the Library group, in order to fund new initiatives. The Library has needed to leverage many free online applications available in order to improve Library Services, such as the development of their online Library card registration.	There is an opportunity to develop an alternative funding model in order to support the needs for additional Library funding. In addition to existing fundraising and alternate grant efforts, the Town should investigate their ability to obtain sponsorships as an avenue for additional funding. Consideration could also be given to conducting an overall assessment of not only the demographic they are currently trying to serve today but as well to envision what the delivery of services will be for the residents in the future. This will result in improved service output for the Library services, as they will have the funding required in order to fully develop their needed programs and services for the community today and for the residents in the future.	Medium	Low	Medium	Service level impact	N/A	Long Term
57	Technology access and assistance	Library	Library Services	Evaluate which services within the Library division can be further leveraged with technology.	The Library staff has found that not all services need to be physically delivered in the Library. For example, the staff has recently moved the	There is an opportunity to evaluate which services within the Library division can be further leveraged with technology. The Town should consider which	Low	Medium	Low	Efficiency gain	There is a risk that some less tech-savvy members of the population will	Medium Term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					registration of Library cards online and has moved some of their services digitally into schools and nursing homes.	existing Library services can be digitized and has the potential to be moved online. As a result, this will reduce the strain on the Library staff's current resources and increase efficacy by allowing members of the Town to self- serve. This should be considered in conjunction with the opportunity to implement a CRM software that would integrate all of the Town's services into one platform (opportunity #91).					not want to utilize these digital resources due a resistance to adopt technology.	
58	Information desk	Library	Library Services	Develop a replacement roadmap for the current systems in use by the Library division.	Currently, the Library division's existing software systems are coming to the end of its technological life and require replacements. This has impacted the efficiency of their operations and has made the process cumbersome.	There is an opportunity to develop a replacement roadmap for the current systems in use by the Library division. The Town should assist the Library to determine and evaluate which existing systems within the Town can be further leveraged by the Library, as this would allow for a more seamless integration and reduce costs. For systems that would indeed need to be replaced, the Library division can perform an external system selection process based on the division's business requirements	Medium	Medium	Low	Service level impact	Up-front investments will be required in order to realize full benefits in the medium term. New software also requires change management efforts.	Medium Term

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						and needs. This roadmap would consider sequencing the system replacements to match budget constraints and limitations. This will result in enhanced service output for the Library, allowing the division to operate in a more efficient and quicker manner with improved tools and technology.						
59	Capital projects	Public Works, Engineering and Environmental Services	Water, Wastewater, Transportation	Further leverage the Worktech system, through the use of the GIS integration suite for all workorders to be in one centralized system.	There is a lack of integration between various systems used within the Public Works and Engineering department. Regular preventative maintenance programs in the plant, such as flushing hydrants, are not tracked in Worktech compared to their other maintenance programs. The regular preventative maintenance programs are tracked within a Geographic Information System (GIS) overlay software called, RJ Burnside. The Engineering department will use the GIS system to record the work that was completed, export the data into excel spreadsheet	There is an opportunity for the Town to further leverage Worktech for all workorders to be housed in one centralized system. The Town could consider using the GIS integration suite instead to include the GIS data within Worktech. This will allow for an improvement of the process and will ensure that all data can be collected in one central location. This will improve the accuracy of the data related to time and attendance by removing the manual component of staff inputting data into excel and improve the accessibility staff by all departments to retrieve and analyze data across the organization. This would allow for	Medium	Low - Medium	Medium	Efficiency gain	There may be a learning curve involved in learning a new process and some employees may be resistance to change their current processes.	Medium term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					and track time related information manually. In addition, the roads patrol workorders are also managed within RJ Burnside and this information has not been integrated with any other system in the organization. This activity leads to inefficiency in the process and increases the risk in errors or omissions in the manual tracking of the excel file as time and attendance data regarding the maintenance programs are not within the same software program.	greater collaboration, communication and data sharing across all departments and leadership in the Town. Furthermore, a centralized asset and work management system can be used to forecast workloads, rebalance planned work against staff resources and enable the Town to conduct complimentary work simultaneously.						
60	Water operations	Environmental Services	Water	Implement an invoicing software system for work order billing	There is a duplication of efforts within the water billing process. The clerk handling the water billing process will track the data manually and re-input as well as re-record the data into the billing system, creating inefficiencies and increasing the risk of errors within the billing process due to the manual efforts required.	Town to implement an invoicing software system. This system would be used not only for the water billing process but for other work order billing activities Town-		Medium	Medium	Efficiency gain, service level impact	There may be a learning curve involved in learning a new process and consideration should be given to the integration to the existing systems in use within the	Medium term

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						duplication of efforts and improve efficiencies by streamlining the billing process as it would only require staff to input data once into a centralized system. This would also improve the timeliness of the invoices being issued which would improve the service provided by the department.					department and the Town.	
61	Transportat ion, Active events, IT Infrastructu re	Public Works, Parks, Recreation and Culture, Customer and Corporate Services	Transportation , Facilities, Information Technology	Implement a formalized service level process within the Public Works for summer maintenance, Parks, Recreation and Culture and IT departments to define the level of service within the organization.	There are no formalized levels of service requirements for measuring and tracking service throughout the year. For example, The Public Works and Engineering department is confident that they have met the level of service required for summer maintenance however, this has not been validated against any formal metrics. In addition, winter requirements are tracked differently and there is no consistent and defined guideline for tracking throughout the year. This has impacted their ability to compare and analyze the Town's service delivery level	delivery performance and to be tracked across different services for both full-time and contracted staff throughout the year. This	Medium	Low	Low	Service level impact	Some employees may be resistance to change their current processes	Short term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					against other municipalities. This is also an issue within the Parks, Recreation and Culture department and has resulted in issues with hiring external contractors to perform work for the Town, such as deep cleaning services for COVID, where the contract cleaners did not achieve the level of service the division was anticipating. While the department has piloted a list of performance measures for the division at the micro level, further discussions are required to fully develop these service level standards. In addition, the IT department does not have a defined set of service standards. The IT department has a light service catalogue that they follow, to manage expectations of the divisions that they support. Currently, the IT team is performing their day to day activities, where they focus on completing requests as quickly as can allow. However, their							

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					service catalogue is not customer service focused at the moment.							
62	Internal support services	All	All	Develop and implement a Town- wide workforce strategy to determine optimal resourcing structure and process across the organization.	Various departments within the Town believe they are operating in a reactive manner rather than operating proactively. As such, they do not have the ability to stay on top of best practices since their resources are constrained and they are only able to focus on the day to day activities instead of strategic and value add items. The Town has struggled to retain and attract skilled labour within the Community Recreation division. In addition, the Parks and Maintenance division has noted that they often face issues regarding adequate staffing on the weekend. Furthermore, other departments have identified potential inefficiencies within their staffing model and have struggled to support the	There is an opportunity for the Town to develop a workforce strategy to be used across the organization. This strategy would include an evaluation of the division's staffing complement by reviewing the team's roles and responsibilities. This will allow the divisions to revise responsibilities and reallocate resources to key areas of need and to improve prioritization of tasks. This would allow the Town to gain a better understanding of the optimal staffing considerations and processes for the Town in order to operate in a more efficient manner. Consideration should also be given to exploring different avenues to better promote the Town as an attractive community by benchmarking its current operations against its peers to modify their approach and to help improve the pipeline of potential	Low	Medium	Low	Service level impact, efficiency gain	It may be difficult to receive approval from department's regarding change in workforce	Medium term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					overall growth impacting the Town.	employees. In addition, further understanding of how and when to leverage external resources should be explored as well. This review should be considered in conjunction with any potential automation within their department as this will increase the division's capacity, free up time for staff to work on value- add activities moving forward and reduce the strain on the existing staff.						
63	Transportat	Public Works and Engineering services	Transportation	Conduct a review and update regarding the Public Works and Engineering policies and procedures on a periodic basis.	The department has noted that their policies and procedures are outdated and have not been updated in over six years and have not been able to analyze development charge studies as there is not enough time, capacity or resources to allocate to these projects. From a Public Works perspective, the Salt Management Plan was last revised in 2006 and the Winter Control policy was last revised in 2015. From an Engineering perspective, the Engineering	There is an opportunity for the Public Works and Engineering department to conduct a review and update regarding their policies and procedures on a periodic basis. This would allow the department to conduct and provide better analysis with respect to the development charges as the activity would be conducted in a consistent manner. This would result in efficiencies gain as the revised policies and procedures in place would streamline the process.	Low	Medium	Low	Efficiency gain	N/A	Medium term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					design standards requires updating as the last update was in 2007. Other Engineering policies and procedures that require updating include: By- Law 03-103 (the by-law to prohibit or regulate the placing or dumping of fill) and the drainage policy in relation to drainage issues on private property.							
64	Developme nt engineering services	Engineering Services	Development	Develop an ongoing project focused on analyzing development levels and growth for the Town.	The level of development and general level of activity within the Town has grown substantially, observing growth from \$60M to \$200M over the past few years. With the impacts of COVID-19, seasonal residents from larger cities such as the GTA, have become more permanent residents. As such, there is a knowledge gap regarding service level expectations from new residents, information on new residents, and impacts this growth will have on the Town and their services.	There is an opportunity for the Town to develop an ongoing project for the Public works and Engineering department focused on analyzing development levels and growth trends for the Town. This project would be prioritized and be a part of the key activities within the team. This project would also have a designated individual dedicated to the project. This analysis will enable the Town to better understand the changing environment and respond appropriately to the evolving demands and standards of the Town. Furthermore, the Town will be able to gather	Medium	Medium	Low	Service level impact	It may be challenging to designate staff to this project due to existing resourcing constraints	Medium term

	O	verview			Орро	rtunity Assessment			Opport	unity Quantii	ication	Other Considerations
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						insights and data to better support the growth overall and provide better service.						
65	Developme nt engineering services	Engineering Services	Development	Create an updated asset management plan that includes improvements to the Engineering department's assets.	The Engineering department currently does not have an asset management plan in place, that includes current projects or will help to identify replacement priorities. The absence of an updated asset management plan makes it difficult to formulate long term or future oriented strategies, such as addressing aged infrastructure. Some infrastructure used by the department is old and outdated. As such, it has become challenging for the department to manage its day to day processes with other divisions in the Town. For example, the water treatment plant uses old technology that does not work well with the building department's newer system. This has caused inefficiencies within their daily	There is an opportunity for the Town to create an updated asset management plan that includes current projects, replacement priorities, and strategic plans for the department. This will allow the Engineering department to better understand its current state and to adequately plan for future requirements by reviewing and understanding which technology systems should be replaced and where upgrades or replacements are needed. This provides an opportunity for the department to clearly identify its asset management needs to provide to Council. This will result in efficiencies as the department can improve the management of their assets in a more effective manner. Furthermore, the plan can help to inform other key decisions within the department and as a planning tool to strategically determine services.	Medium	Medium	Low	Service level impact, efficiency gain	It may be difficult to designate the resources to create the plan due to current resource constraints	Short term

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					operations and challenges for the department.							
66	Developme nt engineering services	Engineering Services	Development	Introduce specialized skillsets through the introduction of a third-party service on retainer or a specialized consultant within the Engineering department.	The Engineering department has noted that they currently lack specialization in their department as staff members are all generalists. There is a need for specialization to meet the demands of complicated developments as they require a more specialized skill set in order to be able to analyze these developments.	There is an opportunity for the Town to introduce specialized skills sets through the use of a specialized consultant or service provider within the Engineering department. By supplementing the existing workforce with external practitioners, this would allow the department to augment their team complement and overall skill set. Sourcing external labour would act as an extension to the team and would allow the department to fill the gap of a specialized skill set within Water Resources Engineering (stormwater management), Traffic Engineering, Environmental Engineering (soils) and Electrical Engineering (traffic signals and street lighting.) This would result in improved service provided to the Town, cost savings and would allow the department to execute more effectively.	Low	Low	Low	Service level impact	Contract labour could result in a difference in quality of service provided and could be challenging to integrate with the rest of the team	Short term

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67	Town events	Parks, Recreation and Culture	Culture & Events	Investigate potential software, to supplement the Town's building permit process, as well as streamline and automate the special events permit process, if possible.	Currently, the department does not use a workflow or reporting tool to track and record activity within the department. For example, the special events permit application process is tedious and often very time consuming for staff to review. A Town member will put in an application for a special event permit and is reviewed by a staff member. The application is reviewed by a series of department heads via email before obtaining final approval from the Special Events Manager. Approximately 110 to 120 events are held each year, requiring significant back of forth and time spent between the department and permit requestor. On average, it can take between one to four weeks to receive the required responses from other departments. Furthermore, approving authorities have been lenient regarding approval timelines and often	There is an opportunity for the Town to assess a new permit management software. The Town should assess software with the ability to modify and adapt to the Town's building permit needs, and accommodate the tracking, reporting and workflow of the special events permits process. This systems selection process would involve analyzing the potential systems against the business needs and requirements of the Special Events team. This would allow the team to standardize, streamline and automate the permit approval and issuance process as well as providing the team access to reporting information. This would result in an increase efficiency, reduce costs, improve service delivery and ensure accountability. Consideration should also be given to existing software within the organization that could be further leveraged.	Medium	Low	Medium	Efficiency gain, cost reduction and service level impact	There may be a learning curve involved in learning a new process and some employees may be resistance to change their current processes.	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quantii	ication	Other Considerations
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					times, communication is scattered therefore details are often missed and overlooked.							
68	Cultural spaces, activities and 3rd party events	Parks, Recreation and Culture	Culture & Events	Create a cross training mandate to ensure employees can be trained on a range of roles and share the responsibility of the administration function within the Culture and Events department.	The administration function within the Culture and Events department is driven and managed by one staff member. This has resulted in significant reliance on one person to carry out all activities within the administration function, increasing the risk within the department's operations as they may not be able to function in the event of the staff member's absence or departure from the organization.	of roles which includes the	Low	Low	Low	Service level impact	This may be a time-consuming exercise and requires staff to dedicate time to the task.	Short term
69	Town events	Parks, Recreation and Culture	Culture & Events	Develop a standard policy for special events that includes a formal approval checklist.	The Culture and Events department often receives a high volume of request for approval of events. The team approves the events as requested however, there are	There is an opportunity for the Town to develop a standard policy for special events that includes a formal checklist to create a stronger framework around assessing the event's potential	Medium	Low	Low	Service level impact	N/A	Short term

	C	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					no formal guidelines regarding event selection and approval that currently exists within their process. The team is unsure whether or not the events that are approved align well with the programs in the community and the department's overall mandate. In addition, event capacity is also an issue therefore, the department should be more selective within their approval process.	and approval the event. Criteria from the checklist should align and be included within the special events permit application. The checklist should be developed to assist staff in understanding what events should be approved and provide a standard guideline for all staff members to follow. This framework will streamline the application intake process, ensure that the town's events contribute to the mandates of their two programs and improve the service level provided.						
70	Town events	Parks, Recreation and Culture	Culture & Events	Increase the number of users on the PerfectMind system by formalizing the policy regarding facility booking and scheduling through mandatory use of the system.	The Town uses PerfectMind, a cloud-based Parks and Recreation management software system to manage facility booking and scheduling. While the department has a number of users on the system, they would like to see an increase in users within other divisions, further leveraging the software and its capabilities within their operations. Increasing users would allow for the system to	scheduling. This policy should include details regarding formal and mandatory use of the system across the entire organization. Standardizing this process will	Low	Low	Low	Efficiency gain	Resistance to change from other departments regarding the process	Short term

	O	verview			Орро	rtunity Assessment			Opport	unity Quantii	îcation	Other Considerations
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					capture of all of the Town's facility booking and scheduling across the organization in one centralized area and would improve the collaboration across the Town as all divisions would have access to this system.	and scheduling completed within a centralized system.						
71	Recreation services that are social in nature	Parks, Recreation and Culture	Administration	Assess, evaluate and formally define the roles and responsibilities of the Coordinator within the Community Wellbeing & Inclusion division.	Within the Community Wellbeing & Inclusion division, the roles and responsibilities are unclear. This division is handled only by the Coordinator. The responsibilities of the Coordinator within the division have grown significantly since inception and as such, it has become increasingly challenging to meet the current expectations and demand of the division as there lacks a clear direction and control regarding scope of the position. For example, the Coordinator has addressed a high degree of social service issues and needs, however, the current growth rate of the list	There is an opportunity to assess, evaluate and formally define the roles and responsibilities of the Coordinator within the Community Wellbeing & Inclusion division. This will allow the Town to gain a clear understanding of the current resourcing landscape and evaluate the roles and responsibilities of each position. This activity would also include defining the roles and responsibilities which will provide further clarity and direction regarding scope of each role and allocate responsibilities more appropriately. This would also allow the division to revise responsibilities and reallocate resources to key areas of need to improve efficiency. Consideration	Low	Low	Low	Service level impact	N/A	Short term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
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					of responsibilities can no longer be supported by one member.	could also be given to conducting a jurisdictional scan to determine the scope and boundaries of Provincial vs Municipal service responsibility. This would result in an increase in level of service provided and efficiencies gained as staff will have a better understanding of expectations within their role.						
72	Info communica tion	Parks, Recreation and Culture	Administration	Conduct a user fee review within the Parks, Recreation and Culture department.	Currently, the Town is investing more heavily than other municipalities on Parks, Recreation, and Culture in order to support their growth and tourism. In the 2021 budget, the amount that has been allocated to Parks, Recreation, and Culture is approx. \$7 million. Furthermore, the Town operates with a high social consciousness by charging user fees at a low cost to all participants which encourages inclusion. For example, instead of pricing a program for higher income participants at \$30 to offset the costs for lower	There is an opportunity for the Town to conduct a review on their user fees for Parks, Recreation, and Culture in order to determine the optimal price to charge each participant group. This will ensure that all participants are able to pay a reasonable cost while enabling the Town to cover some or all of its costs of their services, as it deems appropriate. Additional mechanisms for further subsidies to directed demographics could be considered. This will ensure that the Town is being financially prudent by considering how they can recover their costs in a more	Medium	Medium	Medium	Revenue generatio n	N/A	Short term

	С)verview			Орро	rtunity Assessment			Opport	unity Quanti	îcation	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					income participants to join for free, the Town charges all participants \$2.	effective manner, which will result in revenue generation.						
73	Council support services	Corporate Management	Clerk services	Further leverage iCompass capabilities with respect to assigning items to specific team members, tracking of agenda items and streamlining the overall agenda preparation process.	Currently, the Town has only been utilizing approximately 75% of iCompass' features. iCompass is a local government software solution that the Town has been utilizing for the past three years. Currently, Clerk services cannot send documents and items (such as motion summaries, resolutions, etc.) to specific members of meetings in iCompass. As a result, a manual excel spreadsheet template is utilized by the team to track all items that Clerk services must send out to each individual team member. Additionally, divisions outside of Clerk services utilize SharePoint as a central repository, outside of iCompass, in order to track documents required before and after the Council meetings. This has required the team to	current process. For example, the Town could investigate the existing features in iCompass to assign and send documents to specific individuals. Automating the transmission of documents and other manual tasks currently being performed will help to streamline and improve the efficiency of the overall process. The Town could also explore an existing feature in iCompass that	Medium	Medium	Medium	Efficiency gain	Up-front investments will be required. New software also requires change management efforts as staff may be resistant to change.	Short Term

	0	verview			Орро	rtunity Assessment			Opport	unity Quantii	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					reference data in two different areas as documentation is tracked outside of the iCompass system. Furthermore, the agenda preparation process is highly manual and has resulted in inefficiencies. Staff reports are prepared by various divisions, saved in each division's respective folder and require various levels of approval. This has resulted in a duplication of effort as a single document will be re-edited by various people within a division rather than layering onto existing edits, which causes accuracy issues.	This would result in decreased work required from Clerk services to transfer information into multiple systems and streamline data retrieval. Furthermore, the Town could leverage the workflow capabilities within iCompass for the agenda preparation process to operate in a more efficient manner. Centralizing the documents to be housed in one area and utilizing the workflow, will allow the Town to better gauge the state of the document, gain a better understanding of the workflow and have greater control over a given document. This will also reduce the duplication of effort, increase transparency of the process and eliminates the manual workaround to allow more time for staff to work on other priority and value add activities.						
74	Council support services	Corporate Management	Clerk services	Implement an e- signature software to improve	Clerk services manually approves and signs off on documentation. This has resulted in significant	There is an opportunity for the Town to explore the implementation of a new e- signature software to provide	Low	Medium	Low	Efficiency gain	Up-front investments will be required. New software	Short Term

	tunity ID Service Division & Sub Section Section Section				Орро	rtunity Assessment			Opport	unity Quantii	fication	Other Considerations
Opportunity ID	Service		Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
				efficiencies within Clerk services.	inefficiencies and a cumbersome process. As a result, Clerk services is looking to implement an e-signature software, to approve items more efficiently. Additionally, Clerk services would prefer to have this feature as a separate software so that it can be integrated among all platforms used by the Town. The division is currently evaluating different software to achieve this.	more efficient ways for documentation to be approved. As the division is currently evaluating different software platform, they should continue to consider and investigate software that would integrate with the other platforms and systems currently used by the Town. The software should be aligned with their delegation of authority by- law. This would involve putting together the business and technical requirements needed for the system and performing a system selection working with the IT division to understand if the chosen software would serve such needs.					also requires change management efforts as staff may be resistant to change.	
75	Internal and external support services	Corporate Management	Clerk services	Implement an external online claim submission tool.	The Clerk services division has had difficulties managing insurance claims from external parties due to the manual process associated with processing insurance claims. Currently, all insurance claims are mailed into the Clerk services division. Managing	There is an opportunity to explore implementing an online claims submission tool that would help the Town to manage the inflow and volume of claims received. A self-serve and web-based service offering would alleviate the current strain on resources, allow for reallocation of time otherwise	Low	Medium	Medium	Service level impact, efficiency gain	Up-front investments will be required. New software also requires change management efforts as staff	Medium Term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					insurance claims is especially difficult when there is a high volume of claims following inclement weather.	spent locating paperwork and provide for more accurate record keeping. This would ensure that a more efficient process is in place and improve the level of service as external parties could quickly access and understand the status of their claims accordingly. Consideration should be given to implementing a tool that is available to all departments across the organization and can be integrated with existing systems in use.					may be resistant to change.	
76	Internal and external support services	Corporate Management	Clerk services	Investigate the capabilities of the existing work order system to determine if other divisions can be included and consider other online alternatives.	The current system for processing insurance claims is highly manual and cumbersome due to the information silos that exist between the Public Works and Clerk services divisions. Currently, the insurance claims process is highly inefficient as Clerk services must spend resources relaying information to the Public Works division to determine if work orders have been completed and if the Town has adhered to their	There is an opportunity for the Town to review the capabilities of the existing work order system within Public Works and determine if Clerk services can use this system to view the work order history, which will help them to process insurance claims. If that is not a feasible option, further online alternatives should be explored, such as, a file-sharing platform between these two divisions or expanding the existing capabilities of the Public Works work order platform through an		Medium	Medium	Efficiency gain	Up-front investments will be required. New software also requires change management efforts as staff may be resistant to change.	Medium Term

	0	verview		i.	Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					minimum maintenance standards. The Public Works division has a system that tracks completed work orders, however, the Clerks Services team does not have access.	additional module. This will improve the speed at which the Town responds to insurance claims.						
77	Internal and external support services	Corporate Management	Clerk services	Supplement upcoming municipal elections workload related to reviewing the preliminary list of votes with volunteers from the community.	During the municipal and board elections, it is the Clerk services responsibility to assist the Town in reviewing the preliminary list of votes. Since this is a large undertaking, Clerk services finds that reviewing this list is a pain point during elections as they must manage this undertaking while performing their normal operations.	There is an opportunity to ensure that Clerk services has the support they need during the elections, by collaborating with other departments in the Town to ensure enough capacity during peak times within the elections. This would supplement the workload related to reviewing the preliminary list of votes and would better support the Clerk services team throughout the election process. Furthermore, this would also result in reduced costs by preventing the need to hire additional staff to supplement this service, alleviates the pressure on the Clerk services team and would improve their capacity to work on value-add activities.	Low	Medium	Low	Cost reduction	N/A	Medium Term

	O	verview			Орро	rtunity Assessment			Opport	unity Quanti	îcation	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
78	Procureme nt services	Corporate Management	Clerk services	Develop and implement outstanding Procurement policies and procedures.	Currently, there are various Procurement policies and procedures that have not been established. There are varying amounts of knowledge and experience between the different departments and as such, this has created inconsistencies within the delivery of the Procurement process. For example, not all divisions understand where a non-standard procurement protocol can or cannot be used. Other divisions that perform Procurement do not always collect WSIB when engaging vendors. Clerk services also has some RFP/RFQ templates that have not been reviewed in five years and have not been updated to industry standards. This could result in non-compliance to certain protocols. In addition, Clerk services does not have formal guidelines to follow when processing insurance claims or when providing staff insurance requirements	and procedures. The Town could first conduct a review on their policies and procedures to determine a full listing of documents that are currently outstanding and develop the policies based on the list. For example, the Town could implement a policy focused on ensuring that RFP/RFQ templates are reviewed annually to align with legislative and industry best practices. They could also look to create a policy to formalize the end to end insurance process with guidance regarding the claims payment and processing process		Medium	Low	Service level impact, efficiency gain	N/A	Short Term

	0	verview			Орро	rtunity Assessment			Opport	unity Quantii	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					related to open market competitions, which has caused difficulties within their process as Clerks Services struggles to determine whether or not certain claims must be paid out and as such, has impacted the timeliness of payment.	approach for each division to follow. This would also help staff gain a better understanding of what is expected through defined documentation, which can translate to improved performance and consistent level of service provided. These defined policies can also provide the centralized service responsible for Procurement services with a basis for enforcement to ensure other departments are following the policies consistently and effectively. Consideration should also be given to managing and tracking all vendor data within the Payables Management module within Great Plains and assigning specific staff members to maintaining these documents on a regular basis to ensure that there is ownership over this task. This will result in a higher level of service output and efficiencies gained as the division will ensure that their documentation remains updated on a regular basis.						

	0	verview		l.	Орро	rtunity Assessment			Opport	unity Quantif	ication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
79	Procureme nt services	Corporate Management	Clerk services	Implement a proactive procurement plan and strategy prior to budget approval.	Currently, the procurement process faces capacity constraints during times where procurement services are required. This is because the staff involved in this process have a high volume of work which results in scheduling conflicts.	There is an opportunity for Clerk services to proactively assist the divisions with developing a procurement plan and strategy prior to the budget approval to ensure that they will have capacity during these times. The Town should consider how many bids they will send out, when they will be sent out, in order to plan and schedule milestones in this project at the beginning of the budget cycle. This will result in increased efficiencies, as the divisions will be able to plan their process more effectively.	Med	Low	Low	Efficiency gain	N/A	Short Term
80	Finding and	opportunity are cor	nfidential and for i	nternal use only.		, 			I			
81	Procureme nt services	Corporate Management	Clerk services	Further centralize Procurement services across the Town.	Currently, procurement activities are carried out by various divisions. As a result, each division has a different method of handling procurement activities as well as different levels of experience with some requiring more support. When	There is an opportunity to further centralize Procurement services across the Town. To support the program, policies and procedures should be created to assist in the transition. By further centralizing the Procurement function, the Town will avoid duplicating services across the organization	Medium	High	Low	Cost reduction, efficiency gain	N/A	Medium Term

	O	verview			Орро	rtunity Assessment			Opport	unity Quantil	ication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					many divisions perform the same service, it can create a duplication of resources and lead to inefficiencies.	which will result in lower costs. Furthermore, centralizing Procurement services will ensure better records management as the services would be delivered in one area, increasing accountability and control over process and as well would allow the Town to deliver higher quality service. Consideration should be given to the division that will own the Procurement function within the Town. In the event of further centralization, the Town should also consider ensuring that the FTE allocation supports the Procurement activities and workload within the centralized department. Other departments which previously had significant procurement efforts may be able to reallocate FTE(s) to centralized procurement processes - new roles and responsibilities should be defined for this centralized department.						
82	Procureme nt services	Corporate Management	Clerk services	Leverage an online workflow tool for Clerk services to use	Currently, the Procurement process can take up to 90 days depending on the nature of	There is an opportunity for Clerk services to explore leveraging a Microsoft Dynamic product, that	High	High	Medium	Efficiency gain	N/A	Short Term

	O	verview			Орро	rtunity Assessment			Opport	unity Quantif	ication	Other Considerations
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				during the Procurement process.	the project and the high volume of activities that must be completed. To ensure that the division requiring Procurement services is progressing, the Clerk services team will track milestones using excel and outlook calendar reminders. Due to the high volume of activities, the process of tracking is time consuming for Clerk services and takes away from the actual work that needs to be completed. If Clerks Services are unable to create additional capacity, they will be unable to increase the volume of work that is required for procurement activities. Furthermore, utilizing excel and outlook is highly manual and has resulted in some tasks that have been missed.	will enable them to plan and track milestones easily, streamline the overall process, and integrate with the Town's existing GP system. An online workflow tool will help Clerk services remain organized, manage the volume of work and tasks in a centralized area and as well, increase efficiencies throughout the process.						
83	Procureme nt services	Corporate Management	Clerk services	Formalize the vendor management process in order to document outcomes of engagements and	Clerk services does not have a process in place to document, evaluate, and track their vendor's performance. As a result, they are unable to	There is an opportunity for Clerk services to formalize their vendor management process. This process should include guideline with respect to the evaluating	Medium	Medium	Low	Efficiency gain	N/A	Short Term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
				evaluate performance.	reference past performance or determine poor performance due to the lack of an established process. It is also more difficult to hold a vendor accountable, without a program in place.	vendor performance throughout the project on a periodic basis and ensuring proper documentation procedures in order to document the outcomes of engagements or services. Information should be documented and managed within the Great Plains software within their Payables Management module. This will enable the Town to make more informed decisions moving forward regarding future engagement with their vendors. This program should also consider training staff to explain the overall process. This will result in increased efficiencies, as divisions would not be required to reach out to various staff to confirm vendor performance.						
84	Procureme nt services	Corporate Management	Clerk services	Engage in a purchasing partnership with other municipalities	Clerk services staff have found it challenging to find time outside of their daily responsibilities to research opportunities for the Town to involve themselves in group buy initiatives or government	There is an opportunity for Clerk services to engage in a purchasing partnership with other municipalities. This partnership will allow the Town access to additional resources and to capitalize on economies of scale	Medium	Low	Low	Efficiency gain	N/A	Short Term

	0	verview			Оррог	rtunity Assessment			Opport	unity Quantii	îcation	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					funding opportunities. This could result in the Town missing potential opportunities for additional funding and programs to improve services, potentially reduce workload, and create more capacity.	that could result in significant cost savings through the purchasing partnership.						
85	Procureme nt services	Corporate Management	Clerk services	Further leverage Great Plains software to manage the purchase order workflow, generate insights from reporting tools and store confidential documentation.	Currently, there are functions within Great Plains that are currently not in use but could address various issues for the Town. For example, in order for a division to issue a Purchase Order (PO) over \$25,000, it must be completed by Clerk services. To issue these large purchase orders, a requisition is created in excel, which is then sent to Finance for approval. Finance will email Clerk services back the approval, which they will forward to the division issuing the PO. As a result, this process is time consuming for Clerk services to complete. Currently, the purchase order system (hosted on CentralSquare) used by Clerks	There is an opportunity for Clerk services to further leverage Great Plains, The finance division's existing software in order to increase efficiencies. The Town should consider further leveraging the Great Plain's PO module to manage the purchase order workflow, by migrating data from the CentralSquare software to Great Plains in an effort to phase out the use of two separate software. The Great Plains PO module will enable Clerk services to issue purchase orders within a centralized system and as well streamline the approval process by routing the purchase order to the appropriate party for approval based on the delegation of authority by-law. This will result in increased efficiencies, as Town	Medium	High	Low	Efficiency gain	N/A	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					Services is separate from the Great Plains software utilized by Finance. Purchasing audit and analytics are only performed when an issue has been identified by the Accounting division, where they are operating in a reactive manner rather than being proactive. Clerk services surety hardcopy documents are stored in a vault and as a result, the process of returning performance deposits is highly cumbersome as this document needs to be physically retrieved. Additionally, insurance certificates are collected once vendors are awarded bids, however, these insurance detroughout the term of the agreement, which makes it difficult for Clerk services to monitor this information and utilize when needed.	software to perform purchasing audit, analytics and reporting on a regular basis. The Town should consider giving Clerk services						

	O	verview			Орро	rtunity Assessment			Opport	unity Quantil	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
						will result in increased efficiency, as the documents will be able to be referenced more easily and would reduce the need for paper and manual efforts.						
86	Procureme nt services	Corporate Management	Clerk services	Develop a more comprehensive training program that contains training guides for divisions involved within the Procurement process.	Currently, there are is a lack of training for both Procurement and non-Procurement staff members. There are varying amounts of knowledge and experience between the different departments, where some divisions are very knowledgeable and confident with the process, while others require more assistance. For example, not all divisions understand where a non- standard procurement protocol can or cannot be used. Other divisions that perform procurement do not always collect WSIB when engaging vendors, which could result in non-compliance to certain protocols. Often, Clerk services finds that bidding requests submitted to the Procurement team are	There is an opportunity for the Town to develop a more comprehensive training program that contains training guides and sessions for all staff involved within the Procurement process. This program would include an increase in formal training sessions to introduce the new policies and procedures developed (opportunity #78) and additional sessions to address the issues noted by the Town. For example, the Town can develop training sessions for non- procurement staff involved in all areas of Procurement and as well increase training regarding document drafting for RFPs and bid requirements and as well development of templates. These trainings should be a mandatory requirement and provided on a periodic basis to ensure that all	Medium	Medium	Low	Service level impact, efficiency gain	N/A	Short Term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					incomplete due to information gaps in areas such as the statement of work, scope, discloses, and evaluation defensibility. Clerk services is included towards the end of the process and is completed in a rush. This requires Clerk services to lend support to those divisions on an on-going basis which interrupts their daily activities. Clerk services also finds that by the time they are brought into the process, there is no longer time for a competitive bid process. Furthermore, non- procurement staff, have limited experience and have struggled with the Procurement process.	staff are keeping their skills current and up to date. To reduce errors post-training, the sessions should be recorded and distributed to each division as a reference for future use, in addition to any other training materials created. This will result in an enhanced service level output and efficiency gains, as training will also ensure that staff members have a better understanding of expectations and their responsibilities on the job.						
87	Finding and	opportunity are cor	nfidential and for in	nternal use only.								
88	Internal and external	Corporate Management	Office of the CAO	Identify the gaps in capacity and capabilities within the Town's policy	Currently, there are staff within every division that perform policy analysis as it pertains to their division. For	There is an opportunity for the Town to identify the current gaps in capacity and capabilities within their policy team. The Town	Low	Medium	Medium	Service level impact	There is a risk that a permanent policy analyst	Short term

	C	verview		i.	Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
	support services			team and evaluate the need to create a permanent general policy role.	instance, The planning, Building, and Economic Development division and the Housing division each have their own respective policy analyst to perform work related to the division's mandate. When there are policies that require an analysis which are not tagged to a specific division, there is an overflow of policy work that is addressed by the executive assistant to the CAO due to the Town's limit in capacity as there is no permanent role for a general policy analyst.	role and provide formal training for this revised role. The Town could also consider hiring externally to meet their needs.					requires formal education. Therefore, if an existing role was expanded it would require a higher investment in formal training.	
89	Internal and external support services	Corporate Management	Office of the CAO	Implement an asset management system, with a focus on proactive asset management as well as on-going monitoring.	A 2014 asset management plan prepared by the Town revealed that they had been under-investing in capital assets by \$2 million, based on their future needs at that time. The Province is requiring that municipalities produce an asset management plan by mid-2021. Although the Town	There is an opportunity for the Town to improve their asset management strategy through proactive monitoring and management of Town assets by implementing an asset management software system. Following the completion of the asset inventory list, the Town should consider exploring an asset	Medium	Low	Medium	Cost reduction	N/A	Medium Term

	С	Verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					is a smaller municipality, they have experienced substantial growth since 2014, which has required significant investments in assets. Currently, the assets and its associated funding are not being monitored proactively and as a result, the Town is adjusting to challenges as they encounter them. As there is a lack of ongoing guidance and proactive monitoring, this has led to reactive management of financial investments in assets.	management software that will allow for more proactive management of the Town assets. For instance, the Town should implement asset management software that will determine the asset's value at the end of its useful life, the replacement cost, asset timelines and automated reminders to log assessments. This will result in better monitoring of the Town's current assets which will allow for improved financial analysis and efficiencies gained as the monitoring would be done in a consistent manner through the year. This opportunity would be aligned with opportunity within the Engineering department, to create a master plan that would include the asset management plan (opportunity #65).						
90	Internal and external support services	Corporate Management	Office of the CAO	Facilitate annual workshops for the division leaders and managers focused on developing their strategic vision and	The Town wants to ensure that those who are the most knowledgeable and experienced in service areas, such as managers, are contributing to the	There is an opportunity for the Town to facilitate an annual workshop for the division leaders and managers focused on developing their strategic vision and roadmap to deliver successful	Low	Low	Low	Service level impact	Delivery of these workshops should be tailored to current public health directives	Short term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
				roadmap to deliver successful services and programs within their division.	development and success of their programs and services. Although some managers have a very clear idea of what success means for their service and vocalize their insights, others do not share their thoughts in the same manner. As a result, the Town may omit valuable insights regarding the ideal future state of their services and points for improvement.	services within their division. An interactive setting will allow the leaders and managers to collaborate and discuss their thoughts in an effective manner. This will result in an enhanced service level output as the managers will gain better insights on how they can continuously improve their services.					considering COVID-19. Effective workshops can be designed for virtual delivery.	
91	Internal and external support services	Corporate Management	Office of the CAO	Investigating the potential to implement a CRM/ CMIS software that would integrate all of the Town's customer service requests into one platform.	Currently, the Town does not have a Customer Relationship Management (CRM) or Customer Management Information system (CMIS) that would allow customers to access all of the Town's online services in one centralized area. For example, the ability to sign up for recreation programs, initiate a dog license, pay taxes, online payments or register for a building permit are all hosted on different servers or must be conducted in person at Town	There is an opportunity for the Town to improve their customer experience, by implementing a CRM/CMIS software that would integrate all of the Town's services and customer requests into one centralized platform. The Town should consider a portal that would allow for members of the community to register and access all of the Town's services, including online payments. In addition, this system would allow the Town to better organize and manage customer inquiries as this centralized system will allow staff		Medium	High	Efficiency gain, service level impact	A CRM would require a significant resource investment	Medium Term

	0	verview			Орро	rtunity Assessment			Opport	unity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					hall. Furthermore, the Customer Service division has expressed a similar sentiment as the lack of online services has impacted their overall operations. The limitation in accessibility of the Town's services to its customer could lead to a decrease in customer satisfaction and service provided. There is also a strong desire from customers of the Town that would like to follow- up on the requests. However, this is a highly manual process as it involves Customer Service filtering through email inquiries or other communication means in order to find past requests as there is no centralized system or database available to track requests, inquiries and complaints received from residents and the status of their respective requests. As a result, this process is highly inefficient. There is also a lack of a centralized process for data maintenance could result	similar tools and software or a shared service agreement with other municipalities. These tools should be evaluated against business needs and requirements in order to find the right fit for the Town. For example, consideration should also be given to data						

	0	verview		L	Орро	rtunity Assessment			Oppor	tunity Quanti	fication	Other Considerations
Opportunity ID	Service	Division & Section	Sub-section	Opportunity Name	Finding	Opportunity Description	Risk The risk to the Town if the opportunity is not implemented (High, Medium, Low)	Complexity The level of difficulty associated with implementing the opportunity (High, Medium, Low)	Cost to Implement - \$ (High, Medium, Low) Low = <\$100K Medium = \$100K-250K High =>\$250K (One-time implementation costs to action the opportunity)	Benefit - (Revenue growth, service level impact, cost reduction or efficiency gain)	Additional Considerations (Risks to implementation)	Implementation Timeframe Short term (< 1yr), Medium term (1 -3 yrs.), Long term (3+ yrs.)
					in having to re-create the repository for data from scratch each time data is required which could lead to duplication of efforts and version control issues. Furthermore, the Town does not have place a system for the effective management of data, documents, records or email. Information currently resides within each department and lacks the ability to collaborate between departments and other functions.							

Appendix B – Program profiles

Community Development

Program Profile

Туре:	Public program
Outcome	Support community development that protects and leverages Collingwood's core strengths (commercial/residential assets and people) and economic growth.
Target Group(s):	Local businesses, property owners, potential investors, and visitors

Service	Division	Sub-Section			
Marketing & business development		Marketing & Business Development			
Strategic planning	Planning & Development				
Application Review	Planning & Development	Planning			
Policy Development					
Affordable housing services	Social Housing	Affordable Housing			
Development angineering convices	Environmental Services	Development			
Development engineering services	Engineering Services	Development			

Environmental Management, Conservation and Sustainability

Program Profile

Туре:	Public program
Outcome	Manage, mitigate and improve the environmental impacts to better serve the community today and for the future.
Target Group(s):	Residents, business owners and visitors

Service	Division	Sub-Section	
National Heritage Advice	Protective Services	Conservation	
Water operations	Environmental Services	Water	
	Environmental Services		
Wastewater operations	Public Works	Wastewater	
	Environmental Services	Wastewater	
		Water	
Capital projects	Engineering Services	Wastewater	
	Public Works	Transportation	
	Engineering Services	Transportation	
		Wastewater	
Studies	Environmental Services	Water	
Studies		Wastewater	
	Engineering Services	Transportation	

Community Safety

Program Profile

Туре:	Public program
Outcome	Ensure the safety of people and property within the community.
Target Group(s):	Residents, building owners and visitors

Service	Division	Sub-Section	
Emergency management			
Fire equipment & vehicle maintenance		Fire Department	
Fire prevention	Protective Services		
Fire suppression and technical services			
Training			
Police services	Protective Services	Police	
Administer and enforce the Ontario Building Code		Duilding Comisso	
Administration of Building Services (non-OBC)	Planning & Development	Building Services	
By-law enforcement			
Animal control services	Protective Services	Protective Inspection and Control	
Crossing Guard			

Community Health and Wellbeing

Program Profile

Туре:	Public program
Outcome	Maintain and encourage better physical and mental well-being within the community.
Target Group(s):	Residents and visitors

Service	Division	Sub-Section	
Active events		Facilities	
Recreation services that are social in nature	Parks, Recreation, and Culture		
Aquatics & sailing school services	Parks, Recreation, and Culture	Recreation Services	
Indoor activities	Parks, Necreation, and Culture	Recreation services	
Outdoor activity, natural spaces and water recreation access	Parks, Recreation, and Culture	Parks	

Arts, Culture and Heritage

Program Profile	
Туре:	Public program
Outcome	Recognize and preserve the strength and diversity of arts, culture and built heritage within the community.
Target Group(s):	Residents, business owners and visitors

Service	Division	Sub-Section
Heritage services	Planning & Development	Heritage
Conservation/promotion of heritage		
Cultural spaces, activities and 3rd party events		
Town events	Parks, Recreation, and Culture	Culture & Events
Support for artistic expression, public art, creativity, promotion and awareness of impacts		
Circulation and curation of library material		
Special collections	Library	Library
Library programming		

Community Mobility

Program Profile

Туре:	Public program
Outcome	Provide integrated, safe and accessible movement of people and goods across multiple modes of transportation (e.g., active, transit, cars, etc.).
Target Group(s):	Residents, business owners, and visitors

Service	Division	Sub-Section	
Parking Services	Protective Services	Protective Inspection and Control	
Transit services	Public Works	Transit	
Turner teli	Public Works	Turning	
Transportation	Engineering Services	Transportation	

Corporate Support Services

Program Profile	
Туре:	Public program & support program
Outcome	Provide effective and efficient cross functional efforts and collaboration to support the delivery of services.
Target Group(s):	Residents, business owners, visitors and Town staff

Service	Division	Sub-Section	
Communication services		Customer Service	
Customer service		Customer service	
Fleet management			
Facilities management			
Asset management		Fleet & Facilities	
Energy management	Customer and Corporate Services		
Health and safety	Services	Human Resources	
Human resource management services			
Labour relations			
IT security and privacy		Information Technology	
GIS services			
IT infrastructure maintenance and support			
Information desk			
Technology access and assistance	Library	Library	
Community outreach	Libraiy		
Room bookings			

Other non-service duties		
Payroll services	Corporate Management	Finance
Accounts receivable services		
Accounts payable services		
Financial reporting services		
Capital asset accounting		
Financial budgeting and planning		
Grant accounting		
Taxation services		
Procurement services	Corporate Management	Clerk Services
Administration	Protective Services	Fire Services
	Planning & Development	Building Services
Internal and external support services	Customer and Corporate	Customer Service
	Services	Information Technology
Info communication	Parks, Recreation, and Culture	Administration

Municipal Governance and Leadership

Program Profile		
Туре:	Public program	
Outcome	Provide effective, responsible and accountable Municipal governance and administration.	
Target Group(s):	Residents and business owners	

Service	Division	Sub-Section
Public leadership	General Government	Governance
Public Commissioner		
Council/committee/board support services		
Planning services	Corporate Management	Clerk Services
Clerical support		
Internal support services for the Mayor/Council		
Internal and external support services	Corporate Management	Clerk Services
		Office of the CAO

Appendix C – Service listing

Program	Service	Sub-section
Arts, Culture and Heritage	Conservation/promotion of heritage	Culture & Events
	Cultural spaces, activities and 3rd party events	Culture & Events
	Heritage services	Heritage
	Support for artistic expression, public art, creativity, promotion and awareness of impacts	Culture & Events
	Town events	Culture & Events
	Library programming	Library
	Circulation and curation of library material	Library
	Special collections	Library
Community Development	Affordable housing services	Affordable Housing
	Marketing & business development	Marketing & Business Development
	Strategic planning	Planning
	Development Engineering Services	Development
	Policy development	Planning
	Application review	Planning
Community Health and Wellbeing	Active events	Facilities
	Aquatics & sailing school services	Recreation Services
	Indoor activities	Recreation Services
	Recreation services that are social in nature	Facilities
	Outdoor activity, natural spaces and water recreation access	Parks
Community Mobility	Parking services	Protective Inspection and Control
	Transportation	Transportation
	Transit services	Transit
Community Safety	Animal control services	Protective Inspection and Control
	Police services	Police

Program	Service	Sub-section
	Training	Fire Services
	Emergency management	Fire Services
	Fire prevention	Fire Services
	Crossing guard	Protective Inspection and Control
	By-law enforcement	Protective Inspection and Control
	Administer and enforce the Ontario Building Code (OBC)	Building Services
	Administration of Building Services (non- OBC)	Building Services
	Fire suppression and technical services	Fire Services
	Fire equipment and vehicle maintenance	Fire Services
Environmental Management,	Water operations	Water
Conservation and Sustainability	Capital projects	Transportation
		Wastewater
		Water
	Studies	Transportation
		Wastewater
		Water
	Wastewater operations	Wastewater
	National heritage advice	Conservation
Municipal Governance and	Public Commissioner	Clerk Services
Leadership	Planning services	Clerk Services
	Clerical support	Clerk Services
	Public leadership	Governance
	Council/Committee/Board support services	Clerk Services
	Internal support services for the Mayor/Council	Clerk Services
	Internal and external support services	Clerk Services
		Office of the CAO
Corporate Support Services	Financial budgeting and planning	Finance
	GIS services	Information Technology

rogram	Service	Sub-section
	Grant accounting	Finance
	Health and safety	Human Resources
	Human resource management services	Human Resources
	Info communication	Administration
	Labour relations	Human Resources
	Payroll services	Finance
	Procurement services	Clerk Services
	Taxation services	Finance
	Capital asset accounting	Finance
	Communication services	Customer Service
	Customer service	Customer Service
	Accounts payable services	Finance
	Financial reporting services	Finance
	Accounts receivable services	Finance
	Energy management	Fleet & Facilities
	Asset management	Fleet & Facilities
	Community Outreach	Library
	Administration	Fire Services
	IT infrastructure maintenance and support	Information Technology
	IT security and privacy	Information Technology
	Information desk	Library
	Technology access and assistance	Library
	Room bookings	Library
	Fleet management	Fleet & Facilities
	Facilities management	Fleet & Facilities
	Other non-service duties	Library
	Internal and external support services	Building Services
		Customer Service
		Information Technology

Appendix D – Jurisdictional scan of KPI implementation

Municipality	Population (2016)	Where KPIs are publicly published
Orangeville	28,900	https://www.orangeville.ca/en/town-hall/resources/Documents/2015- Budget.pdf
Centre Wellington	28,191	N/A
Leamington	27,595	N/A
Grimsby	27,314	N/A
Woolwich	25,006	N/A
Prince Edward County	24,735	N/A
King	24,512	N/A
Clarence-Rockland	24,512	N/A
East Gwillimbury	23,991	http://www.eastgwillimbury.ca/Assets/5+2015+Government/0.4+Publica tions/0.3+Buisness+Plans+\$!26+Budgets/2016+KPIs.pdf
Lincoln	23,787	N/A
Tecumseh	23,229	N/A
Amherstburg	21,936	N/A
Scugog	21,617	N/A
Kingsville	21,552	N/A
Brockville	21,346	N/A
Owen Sound	21,341	N/A
Uxbridge	21,176	https://www.uxbridge.ca/en/living-here/resources/Final- Report Uxbridge-Tourism-Plan-2020.pdf
Essa	21,083	N/A
Oro-Medonte	21,036	N/A
Strathroy-Caradoc	20,867	N/A
Wasaga Beach	20,675	N/A
Wilmot	20,545	N/A
Essex	20,427	N/A

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