



BLACKLINE
CONSULTING

A Higher Standard

Municipal Core Services and Organizational Review

The Corporation of the Township of Georgian Bay

January 2022

CONTENTS

ABOUT THIS REPORT

As per Georgian Bay's RFP (No.2021-11) –

“The Municipal Core Services and Organizational (MCSO) Review is intended to assist staff and Council in assessing the “businesses” a lower-tier municipal government is required to be in while balancing public expectations, ensuring fiscal responsibility, transparency and responsiveness to community needs.

This is not intended to be an exercise to reduce jobs or operations, but rather an exercise that allows the municipality to create benchmarks, develop efficiencies, ensure competitiveness compared to other municipalities and improve the services that the municipality provides.”

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CONTEXT

Context (1/3)

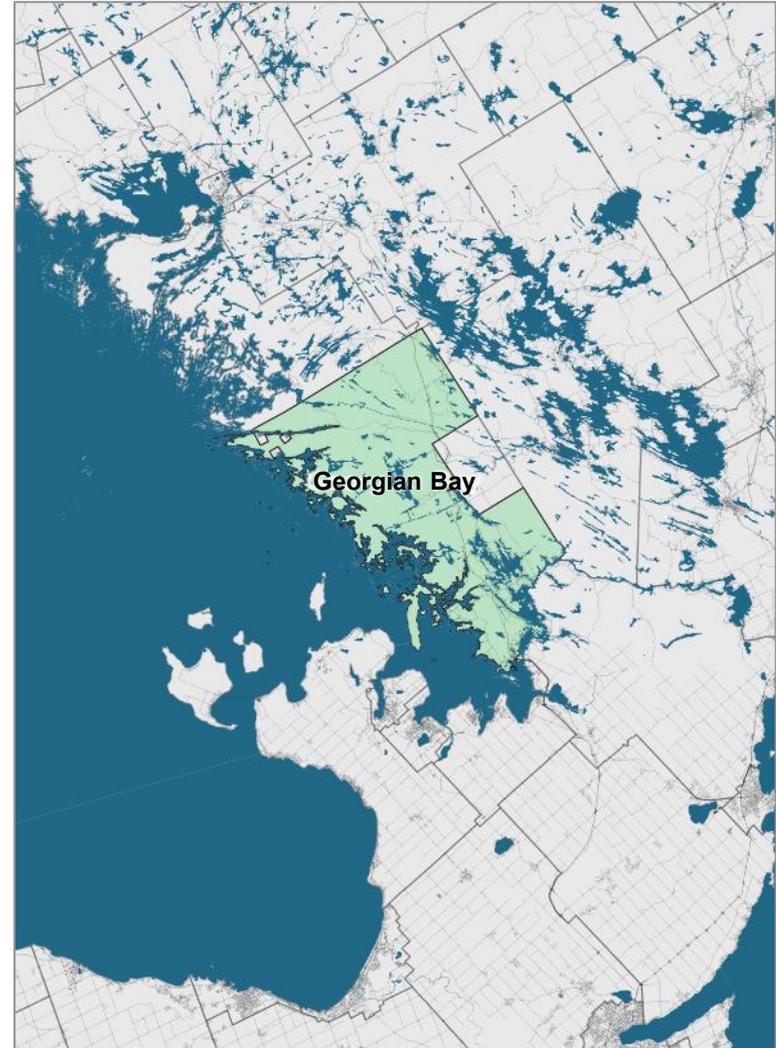
Situation

The Township of Georgian Bay (“Township” or “Georgian Bay”) is a lower tier municipality in the District of Muskoka. The Township’s close proximity to the urban population of Ontario and it’s thriving water-based community offers many high-quality living and recreational opportunities, making it an important tourism and cottaging destination in the province.

In 2014 the Township underwent a Municipal Core Services and Organizational (MCSO) Review. However, since then many things have changed. Like the majority of municipalities in Canada, the Township is facing a number of pressures and challenges with respect to municipal service delivery, public infrastructure provision and public demands amidst a rapidly complex and changing operating environment. With the arrival of COVID-19 the Township is seeing its seasonal population extend the time they stay in the Township and in some cases are year round. Associated with this is an increase in resident expectations. To help ensure the Township is operating efficient and effectively they are conducting another MCSO Review.

The purpose of this report is to:

- ▶ Provide recommendations to help improve efficiency or effectiveness of the Township’s services.
- ▶ Outline a proposed roadmap to implement the recommendations.



Context (2/3)

Changes in work driver (demand) can have a material impact on the efficiency and effectiveness of the service delivery of a municipality

Below is an overview of the degree of changes for macro work drivers and supply over a five year period 2014 to 2019. Overall, there has been an increase in demand. On the supply side there has been an increase in contracting spend but a decrease overall in staffing.

Demand		
Work Driver	Degree of Change	
Population size	↑	Increase – 1%
Households	↑	Increase – 2%
Development Activity	↑	Increase – 25% of # of total building permits Increase – 24% of total value of building permits
Roads	↓	Decrease of 1% in paved lane km, 10% decrease in unpaved lane km (from 40 km to 36 km)
Indoor Recreation Space	-	No change
Outdoor Recreation Space	-	No change
Number of Trails	-	No change

Supply		
Degree of Change		
Staffing	↓	Decrease of 2% for FT staff, -8% PT staff
Total Contracted Service Expenses	↑	Increase – 467% from \$68.4k to \$312.4k. Major driver is transportation services (e.g. roads, winter control, transit) and planning and development services
Total Salary Expenses	↑	Increase – 12% from \$3.6m to \$4.0m

Context (3/3)

A recent peer survey indicates that the impact of the pandemic in Ontario has created a number of challenges for municipalities. Using a cause and effect framework, we attempt to capture the key challenges that participants* are currently managing.

Cause			Effect	
Lockdowns	<ul style="list-style-type: none"> ▶ Inability to travel abroad 	<ul style="list-style-type: none"> ▶ Greater disposable income ▶ Desire to spend more time in lower density population areas 	<ul style="list-style-type: none"> ▶ Residents investing into local real estate (new builds / expansion) ▶ Seasonal residents staying longer ▶ Greater economic gap between population segments 	<ul style="list-style-type: none"> ▶ Higher work volume
	<ul style="list-style-type: none"> ▶ White collar jobs – ability to work remotely 			<ul style="list-style-type: none"> ▶ Increase in resident expectations
		<ul style="list-style-type: none"> ▶ Property value rising – creating affordability issues 		
	<ul style="list-style-type: none"> ▶ Increase in traffic 			
	<ul style="list-style-type: none"> ▶ Staff taking less time off 		<ul style="list-style-type: none"> ▶ Staff burnout and mental health issues on the rise 	

It is unclear how long municipalities will have to manage these effects. However, all agree that the traditional season length is no longer the case e.g. open the cottage Victoria weekend and close it labour day).



EXECUTIVE SUMMARY

Executive Summary – Overview

The opportunities in this Report are from several sources

- ▶ **Service Profiles** – we conducted an analysis of the Township’s services and service standards.
- ▶ **Interviews** – through consultation with management, staff and Council.
- ▶ **Surveys** – surveys with peers, residents and staff.
- ▶ **Our Analysis** – conducting analysis of various data and information provided by the Township. In addition, we have drawn in from our previous experiences and knowledge conducting service reviews where applicable.

There is a total of 28 opportunities, and the top seven of those opportunities are priorities. The Recommendation section includes more details of the top seven priority opportunities.



Executive Summary – Recommendations

The following are recommendations the Township should consider implementing over the next three years

Recommendation	Page Ref.	Timing	Impacted Area	Opportunity Type
1. Continue Enhancing the Township's Website	13-15	2022-H1	All Township Departments	Service Improvement
2. Revise the Official Plan	16-18	2022-H2	Several Township Departments	Service Improvement
3. Streamline the Planning Process	19-23	2022-H1	Planning Department	Service Efficiency
4. Modernize Building Services	24-27	2022-H2	Several Township Departments	Service Efficiency
5. Create a Workforce Development Plan	28-29	2022-H1	All Township Departments	Service Improvement
6. Implement a Human Resource Information System (HRIS)	30-31	2023-H1	All Township Departments	Service Efficiency
7. Improve Solid Waste Services	32-37	2022-H2	Several Township Departments	Service Improvement

Executive Summary – Implementation Roadmap

Recommendation	2022		2023		2024	
	H1	H2	H1	H2	H1	H2
1. Continue Enhancing the Township’s Website	■		●			
2. Revise the Official Plan		■				
3. Streamline the Planning Process	■		●			
4. Modernize Building Services		■		●		
5. Create a Workforce Development Plan	■		■		■	
6. Implement a Human Resource Information System (HRIS)			■			
7. Improve Solid Waste Services	■		■		●	

■ = Duration of implementation

● = Ongoing activity

This proposed implementation plan takes into consideration urgency, dependencies and estimated effort. 2022 will inevitably be another unpredictable year given COVID-19 and the Canadian economy. As such, we recommend that following acceptance of this report, the Township considers the above as more of a sequence of projects rather than a definitive implementation plan. We also recommend that SMT further validate the supporting assumptions, develop more detailed work plans and budgets for the recommendations that deem appropriate.

A photograph of a forest with large trees and a path, with the word 'RECOMMENDATIONS' overlaid in white text. The forest is dense with tall, thin trees, and the ground is covered in moss and fallen branches. The text is centered in the lower half of the image.

RECOMMENDATIONS

Recommendations – Introduction

There are seven priority opportunities the Township should consider implementing

The table to the right lists the priority opportunities. This is a subset of the total opportunities Blackline has identified – see Additional Opportunities section.

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

- ▶ **Situation** – describes the current state
- ▶ **Recommendation** – the recommendation statement
- ▶ **Actions** – the steps the Township should follow to implement the opportunity
- ▶ **Benefits** – the potential advantage of implementing the opportunity
- ▶ **Risks** – potential risks relating to the opportunity

	1. Continue Enhancing the Township’s Website
	2. Revise the Official Plan
	3. Streamline the Planning Process
	4. Modernize Building Services
	5. Create a Workforce Development Plan
	6. Implement a Human Resource Information System (HRIS)
	7. Improve Solid Waste Services

1. Continue Enhancing the Township's Website (1/3)

Situation

The Township's website is intuitively laid out with easy-to-locate forms and information. However, there are some steps the Township can take to better modernize their website and improve their digital services.

Municipalities across Canada are offering more services digitally and are also optimizing their websites for mobile use. In many cases, COVID-19 is accelerating these plans. Below summarizes gaps (in grey) comparing the Township's website to other similar municipalities.

Recreation Program registrations and facility bookings	Planning Services Application submissions, online payments	Building Services Permit applications, inspections, online payments
Operations Repair requests, snow plough tracking, permits	Clerk License application, FOI requests	Map Interactive maps with filter/search capabilities
Taxes Property tax look up (e.g. account information)	Customer Service General inquiries / complaints, community engagement	Recruitment View & apply for Municipal jobs
Search – Detailed search with filtering capabilities		
Live Chat – Ability to chat with agents in real time		

Using a global industry practice* specific for assessing municipalities and the sophistication of their main digital channel (website) we are able to assess the Township. The industry practice assesses five categories:

 Citizen & Social Engagement	Online citizen participation. Focus on online civic engagement/policy deliberation, social media applications, and citizen-based performance measurements.
 Service	Emphasis on traditional services offered online, transactional services, and interactions between citizens, businesses and government.
 Content	Access to current accurate information, public documents, reports, publications and multimedia materials.
 Usability	Assessing if websites are "user friendly". Focus on design, branding, length of homepage, targeted audience links or channels, and site search capabilities.
 Security/Privacy	The level of privacy and security present in municipal websites. Focus on privacy policies, authentication, encryption, data management and cookies.

The Township scored a total of 102 out of 236 points. This is in-line with other similar sized municipalities.

* See Appendix 1 for details of the Rutgers e-governance analysis

1. Continue Enhancing the Township's Website (2/3)

Recommendation

Continue to enhance the Township's website to include more self-service functionality. Make it user friendly by including more online forms and expand online payments (supporting different payments types).

Actions

Step 1: Expand payment options

- ▶ Online payments have become a critical function during COVID-19, and as a response the Township has integrated online payments through its website (Visa and Mastercard). The Township should continue to expand online payment options to include debit / bank transfers.

Step 2: Digitize forms

- ▶ Assess the current forms with the respective department to discuss additional changes (e.g., error checking, drop-down options, consistency, etc.). The Township should determine whether the form should be a web form or PDF and begin making the necessary changes.
- ▶ Additionally, the Township should consider options for handling digital signatures.
- ▶ For inclusivity, the Township should continue to provide printable forms for those that have reason not to use the web e.g. low bandwidth.

Step 3: Revise website privacy policy

- ▶ Based on our analysis, there are number of changes the Township should consider making to bring its website privacy policy in-line with industry. Such as:
 - Establish a privacy policy and have direct access (link) available on every page that requires or accepts data.
 - Provide greater detail to website visitors on the collection of personal information.
 - Identify the organization or agency that is collecting data or information from the website and the use of it.
 - Include instructions on how/if site users can review personal data records and contest inaccuracies/completeness of the information.
 - Identify the use of encryption in the transmission of data and the storage of personal information.
 - Identify the use of "Cookies" or "Web Beacons" to track users.
 - Include an option to receive privacy policy changes or updates.
 - Include an email for inquiries regarding the privacy policy.

Step 4: Identify system integration opportunities

- ▶ As the Township adopts new systems, more opportunities may exist to integrate them with the Township's website. The Township should identify these opportunities and determine the best approach e.g. use of API or a website re-direct.

1. Continue Enhancing the Township's Website (3/3)

Step 5: Implement and test changes

- ▶ Add / revise the digital forms.
- ▶ Implement and test diverse payment functionality.
- ▶ Implement and test the integration between the website and systems.
- ▶ Test the website functionality and its ability to be mobile friendly.
- ▶ Conduct usability and accessibility testing with resident focus groups.
- ▶ Conduct training across the Township on key areas including process, content management, accessibility, payments, and data privacy.

Benefits

- ▶ Greater usability for residents.
- ▶ Greater automation with less back-and-forth from applications.
- ▶ Greater business resiliency (e.g. if office cannot be accessed, physical records are lost, transition to remote work).

Risks

- ▶ System integration opportunities may require more design / customization.

Financial Impact	
Expense Description	▶ None, we assume this work can be done using internal resources.
One-time	▶ None
Ongoing	▶ No net new additional ongoing expense

Assumptions

- ▶ Effort to revamp and digitize forms across the departments will require on average 0.05 FTE from each department. However, some departments with greater involvement may require a more one-time resource commitment.

2. Revise the Official Plan (1/3)

Situation

The Township published the current Official Plan on 17 March 2017 and consolidated it on 2 March 2021. The Township reviews the Official Plan every five years. The next review should be in 2022. This review the effectiveness of the policies and achievements set out in the plan. In addition, the Township has a new Director of Planning.

The Official Plan includes several community plans. Of these community plans, the Cognashene and the Six Mile Lake have the most intricate policies*. Below are some examples that make them intricate:

Cognashene	<ul style="list-style-type: none"> ▶ Great Lakes Heritage Coast and UNESCO Biosphere Reserve designations. ▶ There are specific standards for maintaining the visual character of the Waterfront Community. ▶ Cognashene has nineteen standards and policies.
Six Mile Lake	<ul style="list-style-type: none"> ▶ Planning decisions should maintain and enhance the character of the waterfront. ▶ Requirements of new structures are precise. ▶ There are special policy areas which differ from other community standards. ▶ While Honey Harbour has four standards and policies, Six Mile Lake has fourteen.

Recommendation

Hire a third party to develop a new Official Plan. The new plan should still hold the same priorities listed below, but it should be more specific with comprehensible rules.



Environment



Society



Economy

As well, the Township should consider simplifying the community plans to improve the Planning Department's ability to manage its growing demand.

2. Revise the Official Plan (2/3)

Actions

Step 1: Review the Official Plan

- ▶ Internally review the Official Plan to determine desired changes including new enhancements as well as any issues / challenges.

Step 2: Create an RFP

- ▶ Creating a new Official Plan will require external assistance and guidance. The Township should create a well-structured RFP including (but not limited to):
 - Background and objectives
 - Scope of work
 - Review and assess the existing Official Plan
 - Review and compare with the Districts Official Plan
 - Proposed changes to the Official Plan and planning policy
 - Review and develop zoning regulations for current topics brought forward through public input
 - Draft a new Official Plan
 - Refinement and finalize the new Official Plan and prepare for approval
 - Approach and methodology including their stakeholder engagement
 - Experience and expertise of the consulting firm
 - Timeline and estimated effort of Township staff

Step 3: Go to market with the RFP and select vendor

- ▶ Develop evaluation criteria and a committee to evaluate responses.
- ▶ Collect the RFPs which come in and evaluate them against the agreed upon criteria.
- ▶ Invite those with the highest scores to participate in a shortlist presentation.
- ▶ Evaluate the shortlist presentations.
- ▶ Perform reference checks.
- ▶ Award the highest scoring vendor the contract.

Step 4: Revise the Official Plan

- ▶ Work with the consulting firm of choice from Step 3 above to develop the new Official Plan.
- ▶ Begin implementing the changes as per the new Official Plan.

2. Revise the Official Plan (3/3)

Benefits

- ▶ A plan that guides the direction of the Planning department for the next several years.
- ▶ Help reduce the number of disputes by bringing further clarity to the plan.
- ▶ Integrate sustainability requirements into the official plan to help protect the environment.

Risks

- ▶ Resource constraint in the Planning Department may slow down the process of revising the Official Plan.
- ▶ Communities may be upset with changes and simplifications to their individual plans.

Assumptions

- ▶ The Township's Director of Planning will work closely with the third-party to revise the Official Plan.

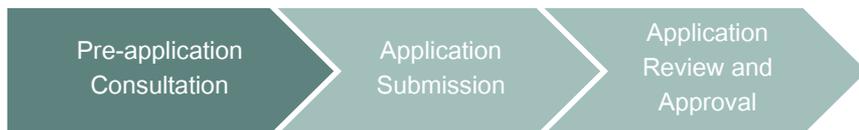
Financial Impact	
Expense Description	▶ Expense for hiring a third party consulting firm to assist with developing the new Official Plan.
One-time	▶ \$200k to \$250k
Ongoing	▶ No net new additional ongoing expense

3. Streamline Planning Process (1/5)

Situation

Seasonal residents are investing more in secondary homes, which has increased volume in the Planning Department. As well, the Planning Department needs to keep pace with its housing growth. Year-round occupied housing units are expected to increase to 1,680 by 2046 (6.2%), and seasonally occupied housing units are expected to increase to 5,230 by 2046 (20.7%)*.

The Township’s Planning Department uses a three phased approach for processing applications.



In 2021, between 1 January and June they received approximately 100 planning applications to review. Each plan takes between 1-3 weeks to review depending on complexity. This is in addition to the 2-3 application documents received daily during the application submission phase. These are expected to increase as household numbers rise and work from home continues.

Currently, Committee of the Whole and Committee of Adjustment occur the same week. Planning needs to prepare for both meetings, which impedes on their ability to meet service standards guidelines.

While the phases are quite common in comparison to other municipalities, there are several opportunities to improve efficiencies. Most notably:

	Files are inconsistently stored as paper and electronic documents. This creates can make it difficult to find files and time consuming.
	There is little automation and reuse of website forms. For example, there are no online portals for booking consultations or for submitting applications.
	Processes between the Building and Planning department should be streamlined for certain applications.
	Consultations are currently done on an ad-hoc basis. There are no specified hours nor a formal meeting room. Staff often stop what they are doing to address these needs.
	Planning staff often deal with residential complaints or concerns about the status of their applications. This impedes on productivity.

* The District of Muskoka’s Forecast and Growth Allocation Report (2019)

3. Streamline Planning Process (2/5)

Recommendation

The Township should undertake the opportunities in the following order of priority:

<p>1</p>  <p>Formalize Scheduling</p>	<p>The Township should start with following recommendations:</p> <ul style="list-style-type: none"> ▶ Establish dates and timeslots for planning consultations. ▶ Revise the frequency of Committee meetings to better align with Planning work volume. <p>This would not take much effort to implement and would cost the least amount of disruptions and money spent. It would also be an internal project that would only impact the Planning Department.</p>
<p>2</p>  <p>Streamline Processes</p>	<p>Next, the Township should streamline its planning processes through:</p> <ul style="list-style-type: none"> ▶ Reducing the use of hard copy files to rely more on systems, e.g., FileHold, to reduce duplication. ▶ Streamlining the process between Building and Planning by adjusting how applications are reviewed between the two departments. <p>This would take collaborative effort with the Building Department and require the onboarding of an intern to digitize and organize paper files. It would have some costs associated with it, but the Township already has the system (FileHold) in place.</p>
<p>3</p>  <p>Digitize Services</p>	<p>Simultaneous with all other projects, the Township should be working to digitize its services through updating its website and integrating TownSuite. It should:</p> <ul style="list-style-type: none"> ▶ Utilize online platforms to improve customer functionality and automate some of the Planning Department's processes. <p>This will be the activity which takes the greatest effort and has the highest costs associated with it.</p>

3. Streamline Planning Process (3/5)

Actions – Formalize Scheduling

Step 1: Vary meetings to improve planning timelines

- ▶ Re-schedule meetings to have 1-2 weeks between the Committee of Adjustment and the Committee of the Whole meetings.

Step 2: Decide on formal hours which are open to residents

- ▶ Create a schedule with set days and times blocked off specifically for residential consultations. Use an online booking system to allow residents and developer book timeslots directly.
- ▶ Utilize Township hall meetings, newsletters, the website and email to advertise these hours.

Step 3: Dedicate a room for meetings

- ▶ Re-purpose an existing room or create an area where scheduled consultations can take place in person.
- ▶ Utilize virtual meeting software (e.g. Zoom) to host meetings with residents who are unable to physically meet or prefer not to have in person meetings.

Actions – Streamline Processes

Step 1: Streamline the process between the Building and Planning Departments

- ▶ Change the process so applications go to the Planning Department first to verify zoning. Afterwards, they should move to the Building Department once approved.
- ▶ The process of amending non-compliance in applications should be between the Planning Department and the applicant before the files are sent to the Building Department.

Step 2: Digitize hardcopy files to improve process efficiency

The Township should reduce its use of hard copy of files and rely on systems like FileHold to reduce duplication.

- ▶ Hire an intern to scan and upload historic files onto FileHold.
- ▶ Organize files so they are accessible and easily searchable.

3. Streamline Planning Process (4/5)

Actions – Digitize Services

The Township should align this action with the website improvement opportunity.

Step 1: Update basic information on the Township's website

- ▶ Create fillable forms with error checking that can be submitted through the website. This will eliminate any back-and-forth with applicants to update or fix errors.
- ▶ Add FAQs and videos to the Township website. Promote this material to residents to help reduce inquiries.
- ▶ Use an online booking system to allow residents / developers to book slots automatically without contacting Planning.

Step 2: Utilize the TownSuite software for planning services

The Township is in the process of adopting TownSuite. It has many of the capabilities necessary to automate parts of the planning application process. The Township should continue with its adoption of the system, and look to integrate the following modules within its website:

- ▶ Process payments through TownSuite's eBilling and ePayments.
- ▶ Have users directly send feedback via the website through its service request feature to decongest emails.

Step 3: Work with a third-party vendor to create customer account functionality on the website

Work with a third-party to create a customer portal where residents can track the status of their requests. I.e., planning applications, permits, comments, concerns, etc.

- ▶ Put together a project team to select a third-party vendor.
- ▶ Create an RFP for a third-party vendor to update the website and create a customer portal.
- ▶ Establish a list of criteria for scoring and grade the submitted RFPs
- ▶ Select the highest scoring vendor.
- ▶ Onboard the vendor and have them create the customer portal.

3. Streamline Planning Process (5/5)

Benefits

- ▶ Seasonal and permanent residents will have greater access to planning resources with improved transparency on the status of their applications.
- ▶ Planning productivity will increase as unaccounted for interruptions will decrease.
- ▶ Improved access to files will make information more accessible and less time consuming to find.
- ▶ Reduce knowledge gaps when there is department turnover.

Risks

- ▶ Introducing a third party to update the website may be costly.
- ▶ Residents may be upset that they need to schedule time to speak with a Planner instead of dropping in whenever is most convenient to them.

Financial Impact	
Expense Description	▶ Some expenses to create a suitable room for holding Planning meetings with residents.
One-time	▶ \$10k to \$15k
Ongoing	▶ No net new additional ongoing expense

Assumptions

- ▶ The Township is able to use its current planning assistant FTE (a student intern) to perform some of the process changes.
- ▶ The Township has already undergone necessary security measures to back-up its FileHold documents in case of an outage.
- ▶ The Township's website has enough server space to host planning portals.
- ▶ The Township will be onboarding TownSuite and is able to leverage it for its website.

4. Modernize Building Services (1/3)

Situation

The Township's Building Department uses a six-phase approach to manage building applications, summarized below. These phases are in line with similar sized municipalities.

1. Application submission
2. Respond to inquiries
3. Plan examination
4. Issue building permit
5. Perform inspections
6. Close building permit

Similar to the Planning Department, the Building Department is also experiencing an increase in work volume due to the COVID-19 pandemic and growth. The Building Department currently issues approximately 540 permits per year and performs around nine inspections every day. This number has increased since 2016 (460 permits) by approximately 17%.

The Department is also responds to customer inquiries relating to Building Code or permits. The volume ranges between 70-100 emails per week, and 30-40 calls per day. They also dedicate a staff time to check building permit applications, of which 90% are incomplete upon submission, including those from the website application form because it does not include any error-checking.

The website has an intuitive and easy to use web form to book a building inspection. However, as it relates to building permits, there are opportunities to enhance the resident experience. Specifically, the application forms do not include error-checking, as well you cannot submit the forms online or make payment. This may be increasing the number of in-person/phone inquiries and decreasing customer satisfaction. It could also result in resubmissions.

Information regarding fees is also difficult to find. The website provides a link to the fees bylaw (that is 44 pages in length).

In field, Inspectors are not utilizing mobile technology outside of taking photos with cellphones. Instead, they are manually writing notes on paper during inspections. They then enter this information into a system when they return to the office.

Although the current process is sufficient, there are opportunities to modernize the department and provide improved services to residents.

Recommendation

Modernize Building services by:

- ▶ Revising the website content and application forms
- ▶ Provide field staff with better technology

4. Modernize Building Services (2/3)

Actions

The Township should align these actions with the website and planning process improvement opportunities.

Step 1: Revise website content

- ▶ Provide a “Frequently Asked Questions” section on the website. Staff should create the content and use common questions that arise. As well, there is some FAQ type information in the building guide that the Township can use.
- ▶ Create a short, concise video (with a link on the website) to help residents submit permit applications.
- ▶ Publish the permit fees in a more user friendly way e.g. rate card (rather than a link to the bylaw).

Step 2: Create an online checklist for customers

- ▶ Create an online, fillable PDF form which allows customers to visualize the documentation and information they will need to submit a building application.
- ▶ Attach it to the guidelines page on the Township’s website for customers to download and use.

Step 3: Introduce application submissions directly through the website

- ▶ Create fillable forms with error checking that residents can submit online. This will help reduce any back-and-forth with applicants to update or fix errors.
 - Include the option for residents to print and fill out an application if that is their preferred method of submission.
- ▶ Allow for online payment when the submit a permit application.

Step 4: Expand the use of TownSuite for building services

- ▶ The Township is in the process of adopting TownSuite. It has many of the capabilities necessary to automate parts of the building application process. The Township should continue with its adoption of the system, and look to integrate the following modules within its website:
 - Process payments through TownSuite’s eBilling and ePayments.
 - Have users directly send feedback via the website instead of emailing through its service request feature.
- ▶ In addition, the Township should look at ways to provide residents with a way to track the status of a permit or inspection request. This will help reduce call / email volume.

Step 5: promote enhancements

- ▶ After these enhancements are in place the Township should promote and market (both internally and externally) these enhancements to increase awareness and adoption.

4. Modernize Building Services (3/3)

Step 6: Improve the Building Department's mobility

- ▶ After the implementation of TownSuite, pilot mobile devices for Building staff. Specifically, a device (tablet or laptop) that is durable, has a cell connection, compatible with TownSuite and compliant with security protocols.
- ▶ This should enable field staff to lookup information on inspections, take pictures, notes and avoid the use of paper / rekeying of information.
- ▶ Once the Township determine a suitable device, roll it out along with staff training.

Benefits

- ▶ Residents will have improved knowledge on how to submit building applications.
- ▶ There should be a reduction in the number of calls, emails and resubmission of permits.
- ▶ Inspectors will be able to work remote, reducing process duplication and increasing efficiency.

Risks

- ▶ Without appropriate promotion, uptake of the online enhancements may be slow.
- ▶ Staff may be apprehensive to move from paper and pen to tablets.

Financial Impact	
Expense Description	▶ Some expenses for field devices (tablet / laptop).
One-time	▶ \$7k – \$9k
Ongoing	▶ Marginal increase for field device data service

Assumptions

- ▶ There are no additional TownSuite licensing expenses.
- ▶ The Township can make the website changes using internal resources.
- ▶ The Building Department will require three field devices.

5. Create a Workforce Development Plan (1/2)

Situation

- ▶ Similar to other similar size municipalities, the Township has several key person dependencies. There isn't a formal cross-training program and required knowledge. This becomes more problematic when a function requires a specific certification or license and can cause delays (e.g. need to wait for that individual to be available) and service delivery challenges.
- ▶ In addition, the Township does not have a Human Resource Information System (HRIS) or a holistic learning and development plan (including tracking). HR does not keep track of learning and development, and there are instances of lapses in certification of staff creating undue operational risks to the Township.
- ▶ While the Township's training budget is consistent (year over year), the spend has reduced from \$95k in 2018 to \$51k in 2020.
- ▶ Lastly, the Township is modernizing its systems and technology (laptops, mobile devices) which will require ongoing training for staff to help ensure adoption especially for those that are not tech savvy.

Recommendation

- ▶ Create workforce development plan to become a more resilient organization.

Actions

Step 1 – Create a baseline

- ▶ Using Excel, create an index of mandatory certifications / licenses by job description. The Township should include useful information such as effective date, lapse period, whether training is required, etc.
- ▶ Identify the status of those certificates / licenses (where possible get evidence and store it using FileHold) and determine if any have lapsed. For those that have lapsed, immediately address the deficiency (e.g. enrol those individuals in the necessary course / tests). For those that have not yet lapsed, create reminders for those staff to meet the necessary requirements before the lapse date.

Step 2 – Build resiliency

- ▶ Work with Management, review existing job descriptions to ensure they accurately reflect the requirements of the Township. Particularly education and expertise.
- ▶ Assess the organization from a risk perspective (flight risk, retirement, key person dependency) and whether that will create and knowledge gaps.
- ▶ Using a risk-based approach (focusing on high-risk individuals) to build a cross-training program. This may include documenting key process activities or formal training and certification.
- ▶ Work with Management, to create a succession plan for key roles in the organization.

5. Create a Workforce Development Plan (2/2)

Step 3 – Create a holistic learning and development (L&D) plan

- ▶ Using the information from the previous steps, create a L&D program for staff and management based on their job description and current capabilities.
- ▶ Overlay this plan with a technology literacy learning plan. This should also align to the job descriptions but consider changes (current and upcoming) to technology that the Township is planning. This training should be periodic and also address cybersecurity awareness.
- ▶ The plan should consider different ways of training and measure the effectiveness of the training by gathering feedback and testing results. Annually HR should work with Management to refine the plan.

Benefits

- ▶ Addresses operational risks caused by lapses in education / certification.
- ▶ Creates a longer-term plan for a more resilient workforce.
- ▶ Creates opportunities for staff (succession and education).
- ▶ Will help promote the Township as a desirable place to work.

Risks

- ▶ HR may not have the capacity to manage this initiative and require additional resources.
- ▶ The Township's current training budget may not be sufficient to address immediate deficiencies.
- ▶ Taking no action may expose the Township to further undue health and safety risks.

Financial Impact

Expense Description	▶ The costs reflect external HR advisor to assist with Steps 2 and 3.
One-time	▶ \$14k to \$30k
Ongoing	▶ No net new additional ongoing expense

Assumptions

- ▶ The Township needs external assistance, at a minimum for job description evaluation and potentially developing a more robust L&D plan.
- ▶ Work should begin immediate and will be manual until the Township is able to implement a robust HRIS.
- ▶ HR would lead this initiative with support from Senior Management.

6. Implement a Human Resource Information System (1/2)

Situation

Township operates with an HR shared service. The Township predominantly relies on manual, paper-based processes for common HR activities (time and attendance, performance management, tracking and maintaining employee records).

- ▶ The Township does not have a Human Resource Information System (HRIS). As such, employees and managers across the Township do not have self-service capabilities (e.g. lookup information, process performance reviews, update learning and development credentials, etc.). This puts a greater reliance on HR to help staff and management perform those tasks.
- ▶ Consequently, this increases the work volume for HR, both transactional HR activities and non-transactional e.g. performance management. It is also causing deficiencies in the effectiveness of HR services.
- ▶ Lastly, the impact of COVID-19 is also causing greater demands on HR, health and safety needs.

Recommendation

- ▶ Implement a Human Resource Information System (HRIS) to automate HR services (including self-service to staff and management) and provide greater data analytics.

Actions

Step 1: Conduct HR process review

- ▶ Create process maps based on the current process.
- ▶ Hold meetings with Township departments to identify their HR needs and any unique elements to their HR practices (e.g. time, attendance, scheduling).
- ▶ Identify opportunities to improve the current process – particularly considering the impact an HRIS has (e.g. process automation).
- ▶ Re-design the process and incorporate any departmental needs.

Step 2: Create and publish RFP

- ▶ Draft a Request for Proposal (RFP) document that includes the Township's HRIS requirements and technical requirements.
- ▶ Engage the Township's departments to incorporate their needs from an HRIS (e.g. self-service, reporting capabilities).
- ▶ Identify any system integration requirements with other Township systems (e.g. FileHold, finance, payroll, TownSuite, etc.).
- ▶ Establish a cross-stakeholder evaluation committee.
- ▶ Circulate RFP internally (e.g. leadership team, IT) for feedback and update document where applicable.
- ▶ Publish finalized RFP.

6. Implement a Human Resource Information System (2/2)

Step 3: Evaluate and select vendor/system

- ▶ Review and evaluate proposals.
- ▶ Using the evaluation criteria and results, hold shortlist demos of the system(s).
- ▶ Re-evaluate vendor scores based on the demos.
- ▶ Select and award the preferred vendor.

Step 4: Implement system

- ▶ Setup project governance with vendor for system implementation (e.g. ongoing project meetings, project budget updates).
- ▶ Engage IT to support with vendor and implementation oversight.
- ▶ Configure HRIS workflows and process to meet HR department needs.
- ▶ Integrate HRIS with other Township systems (as required).
- ▶ Test functionality using real data and scenarios.

Step 5: Train users

- ▶ Conduct training for relevant Township users (e.g. managers) on HRIS.
- ▶ Provide HRIS self-service capabilities training pack to staff.

Benefits

- ▶ Improve management/staff efficiency (self-service and automation).
- ▶ Enable HR to focus on higher value HR activities.

Risks

- ▶ Resource constraints delay the project.
- ▶ Low adoption of self-service continues the heavy reliance on HR staff.
- ▶ Cost overruns with system integrations and implementation of HRIS.

Financial Impact	
Expense Description	▶ None, we assume this work can be done using internal resources.
One-time	▶ None
Ongoing	▶ Software costs will be an ongoing but vary depending on solution.

Assumptions

- ▶ The Township has the expertise and resources to create the RFP and manage the procurement process.
- ▶ Software costs (on-going and one-time) are additional to the above costs and have not been included as it depends on a number of factors (e.g. modules selected, hosting model, integrations) that are uncertain at this point.

7. Improve Solid Waste Services (1/4)

Situation

The Township currently has a contract with the District Municipality of Muskoka (the District), which assumed responsibility for waste management on 1st January 1996. Prior to the agreement, the Township's waste collection was limited with unsupervised bin sites. The Township turned to the District for help, and to further reduce waste collection costs.* Upon entering an agreement, responsibilities of the District include:

Garbage collection	Recyclable collection	Large item pick-up
Operation of landfill sites	Supervised transfer stations	Drop-off depots
Yard waste collection		

The District uses a third-party contractor, Waste Connections of Canada, to collect waste. However, they are expected to terminate this contract as of November 2022, and onboard a new company.**

The Township has two transfer stations and three drop-off depots run by the District. A summary of these facilities are on the table to the right.

Transfer stations	Drop-off depots
<ul style="list-style-type: none"> ▶ Baxter Transfer Station - 980 South Bay Road, Port Severn ▶ Tower Road Transfer Station - 265 Tower Road, MacTier 	<ul style="list-style-type: none"> ▶ South Gibson Lake Road (open year-round, 24/7) ▶ Honey Harbour Firehall Depot (open in the summer only, 24/7) ▶ 12 Mile Bay Depot (open in the summer only, 24/7)

None of these sites are at harbors, requiring water-access only residents to drive to a location once they arrive at a harbor. Considering 45% of households*** in the Township are water access only means a significant number of residents are not receiving equitable waste service. The current agreement states containers and bin sites are available to residents who do not have door-to-door pick up services. However, there is limited information on the location of them and the Province is eliminating mandated waste bins by 2023. In addition, COVID-19 has increased the levels of solid waste in the Township as seasonal residents are able to work remotely and staying longer than before.

Based on a 2008 Township Report on Waste Management, property owners agree that waste management services are the most significant and tangible benefit from municipal taxation. However, it is also known as a point of contention with residents.

Source: * 2008 Report on Waste Management, Appendix A

** [The District Municipality of Muskoka](#)

*** The District Municipality of Muskoka (Geomatics)

7. Improve Solid Waste Services (2/4)

The Township has three alternatives, each has a set of benefits and risks.

Option	Description	Pros	Risks
1 – Status Quo	Re-negotiating the waste management contract with the District to better meet the needs of Georgian Bay’s residents.	<ul style="list-style-type: none"> ▶ Familiarity with the service the District will provide. ▶ A new waste provider will start November 2022, timing to make changes could align well. ▶ No additional costs. ▶ Least disruptive option. 	<ul style="list-style-type: none"> ▶ There are no negotiations or service level discussions once the contract has been signed. ▶ Currently not seeing value for tax dollar from the District, especially with water-access only residents. ▶ Quality of service may deteriorate as demand increases.
2 – Shared Service	Creating a waste management agreement with a neighbouring municipality (e.g. Seguin, Archipelago).	<ul style="list-style-type: none"> ▶ Greater control over solid waste services and decision-making. ▶ Greater geographical alignment of the environment. ▶ Ability to better align with resident service expectations. 	<ul style="list-style-type: none"> ▶ Cost of service may be greater. ▶ More disruptive option.
3 – Take Over	Repatriate solid waste services and either insource the delivery, or contract it out to a third party.	<ul style="list-style-type: none"> ▶ Full control over waste management operations. ▶ Ability to better align with resident service expectations. 	<ul style="list-style-type: none"> ▶ Cost of service may be greater. ▶ Will require more operational involvement than the other two options.

7. Improve Solid Waste Services (3/4)

Recommendation

The Township should commission development of a business case of solid waste services immediately to decide on whether it will transition to the new service provider in November 2022 or select a different service delivery model.

Actions

Step 1: Develop a business case

- ▶ Define the Township's specific solid waste service requirements for both water-access only and others.
- ▶ Understand the proportion of expenses the Township pays the District towards waste management (current and future – new provider).
- ▶ Contact neighboring Townships (that expressed interest in shared services during our review) - the Township of Seguin and the Township of the Archipelago to discuss in detail, scope of service, service standards, costs, timing and governance.
- ▶ Contact the District with a list of requirements and determine if their new provider is capability of meeting these requirements and the consequences (e.g., price increase).
- ▶ Develop a business case that forecasts for the next ten years the financial costs (one-time and ongoing) benefits of the three options (previous page).
- ▶ Perform a risk assessment of each option and build a timeline of next steps and key milestones.

Step 2: Perform public consultation

- ▶ Once the business case is close to completion, the Township will have sufficient information to assess the quantitative aspects. However, changes of this magnitude should have public input. As such, the Township should perform public consultation to understand their position, concerns and desires.
- ▶ The Township should use a multi-channel approach to consultation to help ensure there is appropriate representation from permanent, seasonal, land access and water access-only residents. This change will also impact businesses and the environment and therefore the consultation should also include local businesses and associations.
- ▶ Once the results of the public consultation is available, the Township should analyze them and include it as part of the overall business case.

Step 3: Present results to Council

- ▶ Once the business case is complete, Township Management should review the results and present a preferred option (based on the analysis) to Council for decision-making.

7. Improve Solid Waste Services (4/4)

Benefits

- ▶ The main benefit of this approach is that it will provide detailed analysis to ensure appropriate due diligence of each option.
- ▶ It will help the Township’s decision-making process.

Risks

- ▶ The Township is not able to select a third-party advisor in time to have a decision made by November 2022.
- ▶ The Township does not get sufficient (statistically relevant) input from the public consultation, or it is not representative of all the different residents and therefore the requirements are skewed.

Assumptions

- ▶ The Township’s neighbors are willing to have serious discussions regarding shared services.
- ▶ The Township has the appetite for change and desire for fulsome analysis of all options.
- ▶ The Township does not have sufficient capacity to undertake this work and will need third party assistance.

Financial Impact	
Expense Description	▶ Estimated expense for a third-party advisor to develop the business case.
One-time	▶ \$55k-\$75k
Ongoing	▶ None

A first-person perspective from a red kayak on a body of water. The kayak's cockpit is visible in the foreground. To the left, a yellow kayak is partially visible. To the right, a blue kayak is visible. In the background, there are large, steep limestone cliffs covered in green vegetation, typical of a karst landscape. The water is a clear, greenish-blue color. The sky is overcast and grey.

ADDITIONAL OPPORTUNITIES

Additional Opportunities (1/4)

Themes	Opportunity	Opportunity Type	Impacted Portfolio	Financial Benefit	Impact to Residents	Impact to Org.	Difficulty to Implement	Total Score
Technology & Equipment	Purchase an HRIS that includes recruitment, performance management and learning & development functionality.	Service Efficiency	HR	1	2	3	2	2.0

The following opportunities each have a score based on the below:

Opportunity Type –

- ▶ The type varies depending on the impact it has.
 - Service Improvement: the primary benefit is improving the quality of the service
 - Service Efficiency: will result in more efficient municipal operations

Impacted Portfolio –

- ▶ The service portfolio that the recommendations target

Financial Benefits – Weight = 0.30

- ▶ Score 1: No financial benefit derived (net may increase cost)
- ▶ Score 2: Some financial benefits derived
- ▶ Score 3: Significant cost savings or revenue generating

Impact to Residents – Weight = 0.25

- ▶ Score 1: No noticeable impact felt
- ▶ Score 2: Noticeable impact, but only to a portion of the residents
- ▶ Score 3: All residents will feel impact

Impact to Organization – Weight = 0.25

- ▶ Score 1: Impact is within a department
- ▶ Score 2: Impact is multi-departmental
- ▶ Score 3: Impacts the entire organization

Difficulty to Implement – Weight = 0.20

- ▶ Score 1: Very difficult – barriers need to be removed to implement
- ▶ Score 2: Moderate – requires some investment of time or effort
- ▶ Score 3: Easy – within control of the Township to implement

Opportunity Score –

- ▶ The opportunity score is the sum of the above criteria

Additional Opportunities (2/4)

The following opportunities are in order of score.

#	Problem Statement	Opportunity	Category	Impacted Area	Total Score
3	Records management adoption is mixed and difficult to enforce.	Review the records management/FileHold information requirements to potentially streamline it. Making it easier/more efficient for staff to use it. Also review the FileHold access rights to assess if it is fit for purpose.	Process	All Departments	2.25
32	The Township's corporate strategy is out-of-date.	The Township should use the MSCO and other material to develop a new CSP.	Process	All Departments	2.20
38	Faxes that come through for different departments are being put in a box located outside of door, people are unsure if others are picking up their faxes because there is a lot of paper in the box.	Discontinue the use of faxes.	Technology & Equipment	Multi-departmental	2.20
15	Delegation of work is not formalized, causing confusion.	With the implementation of the new ERP system, consider configuring the system using lean principles, documenting the steps so that staff and management have guidance on how workload is distributed. Ensure this becomes part of training in the rollout.	Process	Multi-departmental	2.00
6	It's been several years since the Township performed condition assessments of its facilities. In addition, new legislation is coming in effect and will require more granular information.	Perform condition assessment of facilities to provide input into new asset management plan.	Process	Multi-departmental	2.00
22	There are missed opportunities between Planning and Building causing additional work.	Consider moving planning and building into one physical location.	People	Multi-departmental	2.00

Additional Opportunities (3/4)

#	Problem Statement	Opportunity	Category	Impacted Area	Total Score
5	Township policies are out-of-date and may not be relevant or enforced.	Review policy template to clearly indicate the policy owner, exceptions and compliance requirements. Include policy review as part of annual performance management to ensure they are kept up-to-date.	Process	All Departments	1.95
16	Time and attendance information can be onerous for staff and supervisors due to the level of detailed required.	Revise time reporting to simplify and reduce the time required to perform time tracking.	Process	Multi-departmental	1.95
37	There is a perception that cemetery fees are low.	Review and possibly realign cemetery fees.	Process	Clerks	1.95
36	Freedom of information requests and payments are not available online. Currently, customers need to mail a cheque and it is inconvenient for residents and staff.	Move to online payments.	Technology & Equipment	All Departments	1.95
34	There is a perception that there is a lack of urgency with the current IT support.	Establish new service levels with the Township's IT service provider.	Process	All Departments	1.95
21	Staff are requesting further training to help them use the technology.	Provide ongoing technical training for staff - basic IT, mobile device, systems to ensure staff are maximizing use of technology.	People	All Departments	1.90
35	The Township does not have an email subscriptions that allows them to send news and bulletin information to residents.	Setup a resident email subscription and newsletter.	Process	Multi-departmental	1.90
29	Planning permit disputes are costly and time consuming. They also cause a divide between residents.	Develop criteria to more critically assess the value of disputing permits. Cost / benefit should be a factor.	Process	Multi-departmental	1.80

Additional Opportunities (4/4)

#	Problem Statement	Opportunity	Category	Impacted Area	Total Score
20	There is a perception by staff that management is making decisions on equipment that is not best suited for the work.	Poll staff for input into equipment / fleet purchases.	People	Operations	1.70
28	The Township's customer service strategy identifies service standards, however few are measured and given current work volume it is likely that they are not achieving them.	Revise the customer service strategy service standards to reflect the current work volume and resourcing.	Process	Multi-departmental	1.70
7	Asset Management is currently a shared responsibility in the Township, and it is unclear who will own the AMP.	Establish an owner of the AMP and roles and responsibilities for it.	People	Multi-departmental	1.65
19	Operations staff travel from one yard to another to get equipment creating a loss of productivity.	Have a set of tools at both the north and south yard.	Technology & Equipment	Operations	1.65
4	The Township has a significant number of physical records, making it difficult to access when work from home. In some cases, its time consuming to find files.	Hire part-time staff or contractors to begin migrating physical files to FileHold.	People	Corporate Services	1.45
41	There is a perception that the equipment Operations use are reaching the end of their lifespan and need to be replaced.	Create an inventory of tools and their lifespan. Replace as required.	Technology & Equipment	Operations	1.40
27	Firehouse system will be unsupported at the end of 2021.	Replace the Firehouse system with an alternate, ideally that neighboring peers also use (if suitable) and consider getting extended support from Firehouse until the replacement.	Technology & Equipment	Fire	1.20



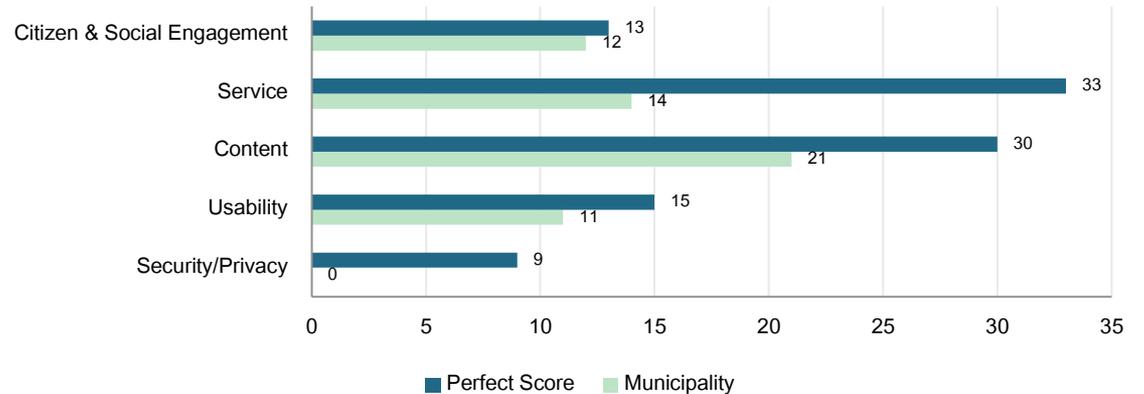
APPENDICES

Appendix 1 – Rutgers E-Performance Index

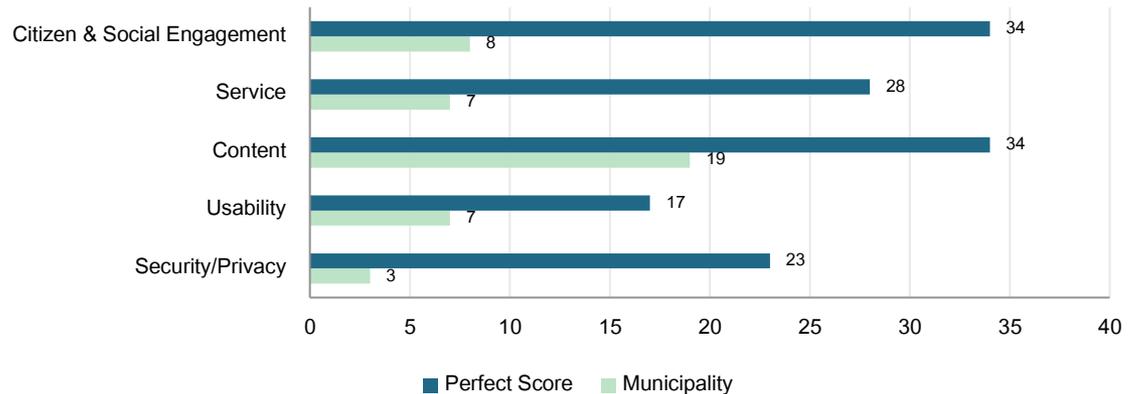
There are over 100 performance measures that break down into standard (meaning all municipalities should have these in place) and discretionary for more advanced / larger municipalities (such as global metropolitan cities e.g. Toronto, Singapore, etc.).

- ▶ The graphs to the right summarize our findings.
- ▶ The first graph compares the Township's standard score to a perfect total score. Broadly, the Township is performing in-line with peers. However, has weaknesses in security/privacy and service.
- ▶ The second graph compares the Township's discretionary score to a perfect total score. The areas with the largest gaps are security, service, and citizen & social engagement.

Standard Digital Performance Measures



Discretionary Digital Performance Measures



BLACKLINE CONSULTING